

## Target group monitoring in European regions: empirical findings and conceptual approaches

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*Christa Larsen, Waldemar Mathejczyk, Jenny Kipper, Alfons Schmid (Eds.):*  
**Target Group Monitoring in European Regions.  
Empirical Findings and Conceptual Approaches**

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Target Group Monitoring is a regional approach to generate data to cover adequately the information needs of labour market actors. Approaches from different European regions are presented in this book, applied onto migrants as a target group of labour market politics. Furthermore, the central elements of these approaches are discussed with respect to their suitability for other target groups, such as older or young employees, low-skilled and skilled workers. Finally, methods and techniques are considered to provide a wide scope of information in combining target group and branch/industry approaches.

This book was developed by several members of the European Network of Regional Labour Market Monitoring.

**Key words:** Regional Labour Market, Target Group, Monitoring, Regional Information

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# Target Group Monitoring in European Regions

Empirical Findings and Conceptual Approaches

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## Foreword of the Editors

Target groups, such as the older unemployed or migrants<sup>1</sup>, are common subjects within labour market politics. There is a concrete need for target group monitoring efforts in order to create a satisfactory transparency in regional labour markets. This enables the development of strategies directly adapted to the situation and needs of these target groups to improve their labour market participation. We are pleased to publish this collection with approaches to and concepts for target group monitoring from various European regions. The applicability of these approaches and concepts for various target groups is also discussed. This creates a broad basis which regional actors in Europe can draw upon.

The present volume is the third collection in a series of publications treating regional labour market monitoring. In the first volume an overview of the German situation was laid out. Volume 2 followed this up with a systematic presentation of the approaches in Europe<sup>2</sup>. Here, in the current volume, the intention is to conceptually expand beyond the branch-oriented approaches that have been used to date. The general concept of regional labour market monitoring was enriched through the specification and integration of monitoring target groups. As in the previous volumes, this book is based on long-term ongoing discussions within the European Network of Regional Labour Market Monitoring<sup>3</sup>. The results of these discussions are reflected in the contributions to this volume. 39 network members from 15 different European countries are involved in this discussion and their unique perspectives and experiences have been very beneficial for the discourse. A salient feature of the European Network is the enriching exchange, not only of the various national and cultural elements but also of the practical forms: scientific studies, experience reports and applied political consultation. The results of this cross-pollination are represented in this volume which we now proudly present.

It cannot go without noting that a significant driving force for the creation of this anthology was the EU-funded project 'Development of a Target Group Monitoring to Support the Integration of Migrants in Employment'<sup>4</sup>. This project arose from a working group within the European Network and has very actively driven the discussion on target group monitoring over the last 18 months. It also provided the material support for the realization of this publication.

All network members as well as everyone interested or involved in regional labour market monitoring in some way are invited to be inspired by the approaches and discussions in

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<sup>1</sup> In this volume the term migrant or migration is most of the time used to describe immigrants and immigration.

<sup>2</sup> Volume 1: Larsen, C./ Dera, S./ Knobel, C./ Schmid, A. (2005): Regionales Arbeitsmarktmonitoring. Ansätze, Konzepte und Entwicklungen in Deutschland. München. Mering; Volume 2: Larsen, C. / Mathejczyk, W. / Schmid, A. (2007): Monitoring of Regional Labour Markets in European States. München. Mering.

<sup>3</sup> [www.regionallabourmarketmonitoring.net](http://www.regionallabourmarketmonitoring.net)

<sup>4</sup> The project was financed by the European Commission – Directorate General 'Employment, Social Affairs and Equal Opportunities' within the Programme 'Mutual Learning' and the Hess Ministry of Social Affairs. The Project ran from December 2006 through June 2008. [www.targetgroupmonitoring.net](http://www.targetgroupmonitoring.net)

this anthology. The contributors and the editors warmly encourage your feedback, comments and questions to this volume.

Finally, we would especially like to thank two people without whose support and specific interest the concepts would not be as far developed as they are. These individuals are Egbert Holthuis from the European Commission Directorate General 'Employment, Social Affairs and Equal Opportunities' and Dr. Walter Kindermann from the Hessen Ministry of Social Affairs. Both individuals have followed the development of the target group approach with great interest.

Christa Larsen

Waldemar Mathejczyk

Jenny Kipper

Alfons Schmid

Frankfurt, the 15<sup>th</sup> of August 2008





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**Address of the European Representation of the  
Bundesagentur fuer Arbeit  
(German Federal Employment Agency) in Brussels**

The existence of the standardised unemployment rate in Europe is an attempt to express a component factor of Europe's economic performance. It is, however, unsuitable for the steering of employment policy programmes and for the adjustment of interventions on the labour market. These must be worked on quite differently. The articles in this volume contribute substantially to identifying the difficulties of an accurate reproduction of processes specific to the labour market target groups, as well as offering some solutions.

The need is evident: the policy requires dependable data in order to outline problem areas and to develop programmes that fit. Labour administration, as the most important actor on the labour market, has to be able to take well-founded and goal-oriented steering decisions. Precisely with Europe in mind, the preparation of an integration balance sheet defining the target groups, as required by law in Germany, can be considered a successful attempt to tackle this problem.

European developments increase the pressure to tackle the target groups monitoring more actively. Demographic development requires at the same time a consideration of the young as an increasingly scarce resource and that of the even older workforce as a resource indispensable until the old age. The concept of flexicurity reveals that the formation of the lifecycle-oriented transitions is the right way for Europe to sustain its economic performance in the global economy above the securing of employability. The „New Skills for New Jobs“ initiative will show, through prognoses regarding training and further training, the ways in which the general qualification levels could contribute to the success of the European economic area. All those measures ask for a better monitoring.

First approaches are already available but further developments are still needed, as pointed out by this collection of articles. Partially, there are still difficulties in the well-directed coverage, as it is the case with people with migration background. An examination of target groups on the labour market in various situations (employment / unemployment / participation in active labour market programmes) is only the first step that more and more additional explaining elements have to undergo (for example in view of the receipt of benefit of various types and in various amounts).

This volume is a comprehensive problem analysis and a collection of ideas, aiming to give the instrument of target group monitoring the meaning that is needed in the present European discussion and situation.

Dr. Wolfgang Mueller  
Director European Representation  
Bundesagentur fuer Arbeit (German Federal Employment Agency)



## Introduction

Labour market politics focusses on groups such as migrants, older and young unemployed, women or handicapped workers; given their below average degrees of integration in the labour market in all European countries. Labour market politics create target group specific measures and conditions for these groups to address these shortages. Beyond these groups labour market politics can also aim at other target groups such as skilled labour. The motivating factor here is not their weak integration or participation in the labour market, rather due to an insufficiently met demand, or the fear thereof; a situation given the label “skilled labour shortage”. This situation, in one form or another, is present in many European countries.

## Target Groups and Regional Labour Markets

The concrete involvement of single target groups in the labour market takes place at the level of the region. Regional labour markets can be defined either as an economic area or as a political administrative unit (such as a county or city). 'Region' is thus a flexible term but it is always a relatively small area, however it may be defined. The general conditions and measures developed by labour market politics for individual target groups can originate within the region itself or at higher level. This varies according to the different political and administrative structures across European countries, as well as the specific nature of a measure to be implemented. The salient point is, however, that support of the target groups is executed within the region itself. This is where the measures are carried out; for example, to improve the employability of target group individuals who are unemployed and looking for a job. Frequently, these measures can take the form of a language course or programmes to improve their soft skills. Labour market integration occurs when, and only when, persons in the target groups become employed. To achieve this, it is often necessary to provide assistance in placing such individuals into open positions, or at least providing information about such positions in companies. In other cases, target group persons can find employment independently of such means. Thus, there is a need for greater transparency in the regional labour market, showing where exactly the employment needs are, and where demand lies. This ensures that their chances for labour market integration are as optimistic as possible. Naturally, regional labour market transparency is also advantageous for companies, as this provides them with the ability to most effectively recruit new employees or improve their internal personnel development. Such an improved information situation is a significant prerequisite for increasing the functional ability of regional labour markets as this improves the match between the regional supply and demand of labour.<sup>5</sup>

## Regional Labour Market Monitoring – from Branch to Target Group Approach

The regional labour market monitoring instrument has been used for several years in various European regions to increase the transparency of regional labour markets. The information generated has not only served direct labour market actors, such as companies and employees, but other labour market political actors who steer the structure of local market conditions. A defining feature of the regional labour market monitoring approach is its user orientation. In the first instance, this refers to providing information actually needed in a region through monitoring. This frequently entails providing information related to

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<sup>5</sup> See Larsen, C./ Mathejczyk, W./ Schmid, A. (2007): Monitoring of Regional Labour Markets in European States. München. Mering.

developments over the previous years or prognoses of future developments. Integral to the monitoring concept is to ensure that all relevant actors in a region are given access to the generated information. Equipped with this information a more solid foundation for the planning and implementing of labour market political strategies is possible, as aiding the orientation of companies and the unemployed. Since the use of the regional labour market monitoring approach continuously generates data and information, the effect of regional measures can also be evaluated. In this sense, regional labour market monitoring can be utilized for planning as well as evaluation purposes.

To date, regional labour market monitoring in Europe is characterised by a branch approach. This means that only selected branches within a region have been monitored. So-called “key branches”, based on a determination of their core importance for the economic development in a region, typically hold the focus. Within the branch approach target groups are insufficiently captured and not differentiated enough<sup>6</sup>. Further development is needed here to advance the regional labour market monitoring to the point that it can be used for the purpose of target group monitoring. This development will be presented in this anthology.

### **Goals and Structure of this Anthology**

This book is meant to provide an overview on target group approaches and concepts currently present in various European regions, and thereby permit deeper insights into their applicability for other target groups. It is also shown how target group and branch approaches can be combined, producing a more textured and comprehensive regional labour market monitoring instrument. In conclusion, further lines of development will be suggested.

Three chapters constitute the core of this book. Chapter 1 derives and critically examines an example of a target group monitoring concept for migrants. The various facets of migration are considered in light of the associated challenges for the integration of the migrants into the regional labour market. Then two different implementation strategies for monitoring this target group are compared. The first describes how strategies can be developed which are grounded in practical experience. The second starts from the conceptual elements of regional labour market monitoring for a regional target group monitoring and derives a strategy from this.

The following Chapter focuses on how far these regional target group monitoring approaches can be applied to other target groups, such as the young or older employees, as well as applications for low-skilled, semi-skilled and skilled workers. This considers also the elements held in common and those that are specific to a selected target group. This concerns primarily the informational content which is relevant in the target group monitoring.

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<sup>6</sup> Larsen, C./ Dera, S./ Knobel, C./ Schmid, A. (2005): Regionales Arbeitsmarktmonitoring. Ansätze, Konzepte und Entwicklungen in Deutschland. München. Mehring.

That target group and branch monitoring can be combined is shown in Chapter 3. This does not follow a conceptual perspective, but rather a practical path at the data level. Two examples are given. The first shows how a branch approach can be further developed to allow for the integration of a target group perspective. The second illustrates how a web-based information system makes possible access with a branch orientation and access with a target group approach.

The conclusion of this book offers first a discussion of the importance of the regional labour market monitoring instrument within the context of the increasingly decentralised labour markets in Europe. This is followed by an outline of the perspectives for the further conceptual development of the instrument.

## **I. Approaches of Target Group Monitoring related to the Labour Market Integration of Migrants**

### **Introduction**

In this chapter approaches are derived and described developed for monitoring the labour market integration of migrants. Putting these approaches in context requires a description of the labour market situation for migrants and the challenges connected to their labour market integration. This is done in Chapter 1.1. It will be shown that migrants as a target group are highly relevant for labour market politics in almost every European country, and that their importance for regional labour markets is increasing. This target group emerges as a highly differentiated one; whether with respect to their qualification profiles or their cultural and social backgrounds. Accounting for this heterogeneity in a monitoring programme represents a significant challenge. In Chapter 1.2 practical examples show how this challenge can be met. One strategy consists, for example, of dividing migrants up into subgroups that have been deemed relevant. Alternatively various data sources and methods can be connected into a very complex structure. Common to both approaches is that they were developed out of practical experience and attempt to deliver adequate information necessary to reach the best possible labour market integration of migrants. In contrast to these examples, Chapter 1.3 offers the development of an approach rooted in the conceptual elements of the regional labour market monitoring. This is demonstrated through an examination of the conditions found in three differently structured European regions.

### **1.1 Challenge of Integrating Migrants in Regional Labour Markets – Scientific and Political Views**

#### **Introduction**

The challenges confronted in integrating migrants in regional labour markets vary greatly across qualification levels, socio-culturally background as well as residency status of the migrants. This is demonstrated in the contributions from Ronald McQuaid and Emma Hollywood, Sibel Kalaycioğlu und Marina Kargalova. A central issue is taken up by Ronald McQuaid and Emma Hollywood when they focus on the migration of highly qualified individuals under the perspective of 'Brain Drain' and 'Brain Gain'. Based on various data sources, they reconstruct the emigration of students from Northern Ireland. They show interesting correlations between socio-cultural characteristics such as religious background and the willingness or the probability of emigration. Additionally, they evaluate the scope and quality of the applied (public) data for reconstructing brain drain and brain gain. From this, they offer suggestions for using such data in other European countries. At the other end of the qualification scale, Sibel Kalaycioğlu took up low-skilled individuals. She describes, using the example of Turkey, how domestic migration from rural to urban areas has developed historically. The consequent social problems, not only those associated with the labour market, are also taken into her account. The developments described here can be carried over to trans-national migration movements, as Marina Kargalova argues. She shows, through the example of Russia, how migration streams of low-skilled workers from neighbouring countries arose and places this squarely in a global process of labour migration. Russia is viewed not only as a labour exporter but also as a labour importer. The example of Russia can be applied to other countries in Eastern Europe, although the effects of these migration movements can be felt also in central and

western European countries. Marina Kargalova strongly argues that regulation (in European countries) can only adequately function when migration is treated as a global phenomenon. The challenges faced by the various groups of migrants in their integration into regional labour markets are extremely heterogeneous. These challenges do not easily permit their restriction to the labour market. Rather, other social spheres are drawn in. This thread is picked up by Atanas Chaushev and Miguel Bernal, who examine the prerequisites of migrant integration from a political perspective. Atanas Chaushev offers the example of various regulations in Bulgaria, where it was attempted to avoid a potential shortage of skilled workers through targeted recruitment and integration measures. On the other side, union leader Miguel Bernal formulates demands on integration services, demands particularly applicable to the Western European countries which reach far beyond labour market integration.

## **Educational Migration – Students Leaving a Region to Study Elsewhere: the Link to Religion in Northern Ireland**

*Emma Hollywood / Ronald McQuaid*

### **Introduction**

This paper reviews data sources concerning the key patterns and drivers of educational migration and non-return in Northern Ireland (NI). In particular it considers the sources of data that can be used to analyse the migration of students. NI differs from the rest of the UK in that religion is seen as playing an important part in influencing the migration of students.

The principle research methods employed in the study are a review of the literature relating to educational migration and non-return and the analysis of a number of secondary data sources (McQuaid and Hollywood, 2008). The principle datasets used in this research include those from Universities and Colleges Admissions Service (UCAS) and Higher Education Statistics Agency (HESA), who are the major providers of data on Higher Education (HE) for the UK. Data on community background, or religion, are only routinely collected in NI and not the rest of the UK, and for this we have drawn on the School Leavers Survey collected by the Department of Education NI (e.g. SLS, 2006; ECNI, 2006a and b). Additionally, data from Northern Ireland Neighbourhood Information Service (NINIS) on deprivation, community composition and social class, are used.

The remainder of this paper outlines the patterns and trends of educational migration amongst graduates and undergraduates; the key drivers of educational migration; and the conclusions.

### **Patterns and Trends of Educational Migration in NI**

#### ***Undergraduate Migration***

Enrolments in HE in NI in recent years have been steadily increasing (DELNI, 2007a, b). The majority of students in NI are NI domiciles, with relatively few educational in-migrants from Great Britain (GB) (note that the UK is made up of GB (England, Scotland and Wales) and Northern Ireland). NI only has two major Higher Education Institutions (HEIs) and the numbers of students studying in HE institutions in NI is very small compared to the number of students domiciled in NI.

Around 71% of NI students actually study in NI (based upon Higher Education Statistics Agency figures) and approximately 29% of students leave NI to study in GB, particularly to universities in northwest and northeast England, although there has been a slight decline in flows since 2001. Scotland is relatively significant as a destination for NI students, despite its size. This may be due to its geographical proximity and cultural links. Although geographically close, the Republic of Ireland attracts less than 2% of NI domiciled students.

Table 1 outlines the regional destinations of undergraduates by their region of domicile. The table illustrates that 71% of NI domiciled students choose to remain in NI for their undergraduate study; this figure is far higher than for any of the English regions, only Scotland, with a figure of 94%, has a higher rate of retention of students. This is due partly to Scotland having a different secondary school and university system to the rest of the UK

(e.g. university undergraduate courses are normally four years long compared to three years in the rest of the UK).

Table 1: Regional Destinations of undergraduates 2005-6

Origin	North East	North West	Yorks Humber	East Mids	West Mids	East	London	South East	South West	Wales	Scotland	NI
North East	<b>62%</b>	8%	14%	4%	2%	1%	2%	2%	1%	1%	4%	0%
North West	4%	<b>61%</b>	15%	4%	4%	1%	3%	2%	2%	2%	2%	0%
Yorkshire & Humber	9%	13%	<b>52%</b>	10%	4%	1%	3%	2%	2%	1%	3%	0%
East Midlands	4%	9%	18%	<b>41%</b>	9%	3%	5%	5%	3%	2%	1%	0%
West Midlands	2%	9%	8%	12%	<b>46%</b>	1%	4%	5%	6%	6%	1%	0%
East England	3%	5%	9%	14%	6%	<b>24%</b>	14%	15%	6%	2%	2%	0%
London	1%	3%	4%	5%	4%	6%	<b>59%</b>	12%	4%	1%	1%	0%
South East	3%	4%	5%	8%	5%	4%	15%	<b>37%</b>	13%	4%	2%	0%
South West	2%	4%	4%	5%	6%	2%	7%	16%	<b>42%</b>	11%	2%	0%
Wales	1%	9%	3%	3%	4%	1%	3%	5%	9%	<b>62%</b>	1%	0%
Scotland	1%	1%	1%	0%	0%	0%	1%	1%	0%	0%	<b>94%</b>	0%
NI	3%	7%	1%	1%	1%	1%	1%	1%	1%	1%	11%	<b>71%</b>

Source: HESA 2006

### Graduate Non-Return and Out-Migration

Graduate migration can be seen as associated with a number of factors including location of employment opportunities, local ties and knowledge of other areas (Bond and Grundy, 2006; Faggian et al., 2006). It has been argued that, of those students that leave NI to study in GB, relatively few return to NI following graduation and that this has an impact on the community composition of the NI graduate workforce.

Table 2 examines where students got jobs, by UK region. The data are from the HESA DLHE (Destinations of Leavers from Higher Education) for 2005/6 six months after graduation (see also DELNI, 2005). This table refers to those students whose domicile is NI, and other UK regions, but does not provide a breakdown on who did or did not study in GB/NI. For NI domiciled graduates it shows that 81% are in NI six months after graduation, 7% are in Scotland, 3% are in London and 3% are in the North West. Only Scotland with 91% and London with 82% have higher rates of retention for domiciled students. Although care must be taken concerning consistency of data, the HESA data indicate that 29% of NI students are in GB, while 6 months after graduation some 19% are in GB; this suggests that a net 10% of all NI domicile students (equivalent to nearly a third of all those studying in GB) return to NI. This may, however, be an over estimate as some of those returning to NI may be there only temporarily, while looking for a job in GB or elsewhere, as well as in NI. The table also shows that both NI and Wales are small destinations for graduates from elsewhere in GB. It should be noted that it is much easier for students to live in their own region and study in another region, or to move only a short distance to a university in another region, within England, than, for instance for a NI student to study in GB.

Table 2: Region of employment by domicile six months after graduation 2005/6

Domicile	North East	North West	Yorks Humb	East Mids	West Mids	East	London	South East	South West	Wales	Scotland	Northern Ireland
North East	<b>76%</b>	4%	7%	1%	1%	1%	4%	2%	1%	0%	2%	0%
North West	1%	<b>78%</b>	5%	2%	2%	1%	5%	2%	1%	1%	1%	0%
Yorks & Humber	4%	6%	<b>73%</b>	4%	2%	1%	6%	2%	1%	1%	1%	0%
East Midlands	1%	5%	8%	<b>61%</b>	5%	4%	8%	4%	2%	1%	1%	0%
West Midlands	1%	4%	3%	4%	<b>70%</b>	1%	7%	3%	4%	2%	1%	0%
East England	1%	2%	3%	4%	2%	<b>54%</b>	23%	7%	3%	1%	1%	0%
London	0%	1%	1%	1%	1%	4%	<b>82%</b>	8%	2%	0%	1%	0%
South East	1%	2%	2%	2%	2%	2%	22%	<b>61%</b>	5%	1%	1%	0%
South West	0%	2%	1%	2%	2%	2%	12%	9%	<b>66%</b>	3%	1%	0%
Wales	0%	5%	2%	1%	3%	1%	5%	3%	5%	<b>73%</b>	0%	0%
Scotland	1%	1%	1%	1%	0%	0%	3%	1%	1%	0%	<b>91%</b>	0%
Northern Ireland	1%	3%	1%	1%	0%	1%	3%	1%	1%	0%	7%	<b>81%</b>

Source: HESA DLHE (2007)

However, further research is needed to determine the community background of these graduates and the relative rates of return migration for each community. Should the return rate for each community be the same, then overall, educational out-migration and return would have a disproportionate effect on the Protestant community, potentially reducing the number Protestants available for graduate jobs.

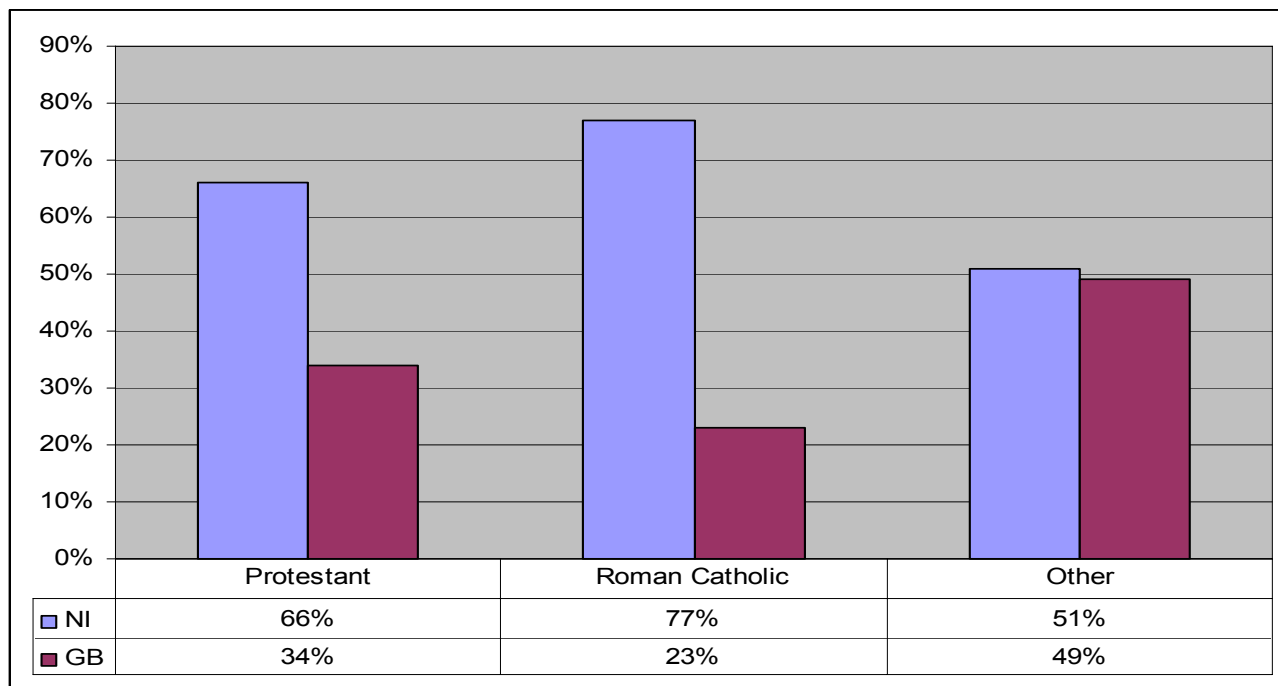
A lack of monitoring data on religion from HESA and UCAS means that it is difficult to identify the religious (or community background) composition of graduates and their destinations. Consequently it is difficult to quantify the impact of both graduate migration and non-return by community background.

### Key Drivers of Migration

This section examines how the various data sources in this research can be used to examine key drivers of educational migration, specifically those of religion, social class and deprivation. Of particular interest in NI is the role of religion in driving educational migration (see Osborne, 2006; and Osborne et al., 2006). Figures from the SLS show that the total numbers of school leavers from Protestant and Roman Catholic communities leaving to study GB are broadly similar, but proportionately many more Protestants out-migrate. Of those that leave to study in GB 44% (1217) were Protestant; 42% (1148) Catholic and 14% (371) 'other'. However, when expressed as a proportion of the total of Roman Catholic and Protestants, a different pattern emerges as Figure 1 illustrates: for Roman Catholics 23% (1,148) went to GB and 77% (3,852) remained in NI; by contrast, for Protestants 34% (1,217) went to GB and only 66% (2331) remained in NI. For 'Others' a much higher figure of 49% (371) went to GB.



Figure 1: HE destinations by community background 2005/6



Source: SLS 2005/6

In understanding the influence of religion on educational migration it was also important to examine differences in educational attainment by religion. Figures on educational attainment from the SLS show that those from the Roman Catholic community are likely to have a greater number of 'A' levels than those from the Protestant community and are also more likely to progress on to HE. In 2005/6 more Roman Catholic (40%) than Protestant (34%) students progressed onto Higher Education. By contrast more Protestant pupils went to Further Education; 32% compared to 24% of Roman Catholics (DENI, 2007). There is also a strong gender dimension with girls out performing boys in terms of educational attainment and progression to HE. For all school leavers, regardless of community background, a significantly higher proportion of girls (44%) went to HE than boys (31%). In particular, it is girls from Roman Catholic backgrounds that progress into HE in the greatest proportions.

School attainment is likely to be influenced by the socio-economic background of parents, and other factors. Hence, the current 'A' level (university entrance High School examinations) results and progression to HE are likely to have been partly influenced by selective educational out-migration and non-return in past decades. For example, if high achieving Protestants leave NI and do not return, then their children will be born elsewhere, so the achievement of Protestants may fall, as typically, children of high academic achievers are more likely to be advantaged and achieve more academically than the children of those with low or no academic qualifications. Of course many other factors are at play.

Previous research has indicated that middle class Protestant students are more likely to migrate to GB. Our research also indicates that those from higher social classes tend to be those that are most likely to migrate from Northern Ireland and in the case of the Protestant community there is greater out migration of middle class students. Geographical analysis, at the Local Government District and Ward levels, shows that students living in more affluent areas (as measured by the index of multiple deprivation data from NINIS) were

more likely to go onto HE and also to migrate to GB for education. The position was the reverse for Further Education, with those in less affluent areas slightly more likely to go to FE than those in more affluent areas. Overall, the analysis shows that migration rates are higher for areas with lower proportions of Roman Catholics. Moreover, the out-migration rate increases in areas of greater affluence (i.e. lower deprivation). The differences in out-migration patterns between those of different community backgrounds/religion are constant irrespective of the level of deprivation within an area.

Also of particular significance are the different age profiles of the Protestant and Roman Catholic communities. The proportion of Roman Catholics in the NI adult population has increased over the period 1990-2005. The Protestant population has an older age profile and accounts for more than six out of ten of those aged 60 and over (OFMDFM, 2007). This may be linked to past differential out-migration (including higher levels of Protestant educational migration) and differential rates of fertility between the two communities. Younger age groups tend to be more evenly distributed or have higher numbers of Roman Catholics. In 1990 54% of the population of working age was Protestant, 41% Roman Catholic and 6% other / non-determined. In 2005 corresponding figures were 50%, 42% and 8% (OFMDFM, 2007).

## **Conclusions**

Although the coverage of UCAS and HESA datasets are extensive, a number of modifications would enable greater analysis of educational migration for NI. In particular the inclusion of a question on religious background would be beneficial. The proposed linking of datasets from UCAS and HESA is likely to provide further detail on educational migration. Although not available at present, it would be useful to trace NI domiciles from school to first graduate destination, perhaps with schools providing a proxy for community background. Analysis of the HESA longitudinal data on graduate leavers will, in the future, provide information on the longer term destinations of NI domiciled graduates (wherever they studied) and graduates from NI HEIs.

Overall there is a complex association between educational migration to GB and community background. Although community background is important, social class and levels of deprivation are also critical. Hence, more research is needed on other demographic characteristics, beyond community background, that affect HE participation, educational migration and non-return. The potential imbalance by gender is also likely to be an increasing issue in the future.

Although a large body of survey evidence has been gathered on school leavers' attitudes to HE and FE, there is less qualitative and quantitative, information on the drivers, motivations and experiences of NI domiciled students once they are in HE institutions and importantly, once they graduate. For example: how do NI graduates working in GB feel about their experience in the labour market and would they consider returning; what have been the experiences of return migrants to NI; and what are the motivations, experiences and perceptions of those that do not return?

Specific research should also consider the extremely high rate (nearly half) of educational out-migration by those stating 'Other' as community background. This should include: to what degree could these people be perceived as belonging one of the two main community backgrounds; or are they from other ethnic minority communities entirely?

Finally, as discussed above there needs to be more analysis of the different characteristics within and between each community, in terms of HE attendance, educational migration and return/non-return and barriers to entry.

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## **Dynamics of Internal Migration in Turkey, its Stages of Development and Consequences for Labour**

*Sibel Kalaycıoğlu*

### **1. Introduction**

Following the end of the Second World War, development and democratisation processes – spread of representative democracy based on multi-party regimes and democratic rights – gained speed within the framework of a Keynesian welfare state model in Europe. Similar democratization attempts also began in Turkey paving the way to the multiparty politics in 1946. Changes in economic structure started as the result of economic policies applied in 1950s, particularly with the introduction of agricultural mechanisation and increasing agricultural production, foreign capital coming to the country, increase in credits given to trade sector, increasing business premises, especially small ones in cities. Mechanization in agriculture and the related de-propertisation had led the migration of several agricultural workers who had lost their jobs and small landowners who had lost their lands, to the cities in the search for new means of survival. Since the 1950s, paralleling economic transformations in agriculture, Turkish society has experienced a period of massive rural to urban migration, with highly complex consequences. This has included the movement of labour, set free by the introduction of new technologies and mechanisation and looking for new means of survival in towns and cities.

According to the 1927 census, Turkey was a predominantly agrarian and under-populated society of less than 14 million, only 16.4% of which live in cities and towns over 10.000. Literacy among the population was less than 9% (Ahmad, 1993, p.74). For the under-population problem pronatalist propaganda was promoted. Since there was no population pressure on the land and land cultivation continued to increase, the increase in population during the next 20 years presented no problem for the towns so that only 18.8% of the population was urban in 1950 (Ahmad, 1993, p.94). During the period of 1923-1950, low rates of industrialisation on the one hand and impact of policies encouraging rural population to remain where they are on the other -which may be linked to each other- effectively prevented any major population mobility (Buğra, 2004). The weight of agriculture was apparent in the sector-based distribution of labour force, putting Turkey in the category of purely “agricultural economy” until 1950s (Buğra, 2004, pp.75-97).

Over the last century, although Turkey has experienced an important internal migration flow from rural to urban areas, considerable amount of population still lives in the rural areas. Even if the employment share of agriculture has declined from 60% in 1975 to 35% in 2003, it remains a significant sector in terms of its share in overall employment. Over time, industry and services have gained importance. While in 1975, 14% of the workforce was in industry and 27% in services, by 2003 these figures had become 19% and 47% respectively. The share of industry has remained stable around 20%, and the fastest growing sector in the past decade has been services (Tunalı, 2003).

In the recent political economic history of Turkey, as the share of agricultural sector steadily falls, the share of industrial sector rises continuously for some time, which experiences a period of stagnancy and then gradually declines though at very small rates. The services sector, on the other hand, appears to be the one whose share is on continuous rise. The absolute decline in the share of labour force employed in agriculture displays different patterns depending on demographic factors, socioeconomic context of

development, economic policies and finally on the pattern of land proprietorship (Gürsel & Ulusoy 1999, p.17). Surplus population in agriculture moves out for subsistence either voluntarily or by force and consequently there comes a change in the urban-rural distribution of people.

*Table 1: Employment by sector in Turkey (1980 and 2004) (World Bank, 2006)*

<b>Sector</b>	<b>1980</b>	<b>2004</b>
Employment (15 years and over) (million)	15.7	21.7
Employment in agriculture (million)	8.4	7.4
Employment in industry (million)	2.3	4.0
Employment in construction (million)	0.9	1.0
Employment in services (million)	4.1	9.4

Until 1980s Turkey's political economy was identified with a type of capital accumulation named import-substitution industrialisation. Its basic characteristics were 'protectionism', 'state involvement', and 'regulated markets'. Towards the end of 1970s, crises emerged both in the economic and political areas in Turkey. End of 1970s were difficult times not only for Turkey but also for other countries due to globalisation and changes in technology. Thus, both national and global crises led to the radical changes in 1980 which shifted the trajectory of economic policies from import substitution to export-oriented growth in Turkey. There has been a widespread restructuring of the economic policy and neo-liberalism has become the new order of this period. This new order brought increasing foreign trade, interest rate liberalisation, deregulation, privatisation, decreases in state expenditures on social services and a liberal foreign exchange regime instead of the state interventionism of the previous period (Balkan & Savran, 2002). 'Free market economy', 'opening to outside' and 'removing bureaucratic barriers' became the popular notions in Turkey after 1980s.

After this brief overview of the developments in Turkish political economy which effected the formation of the labour market, some key facts of the labour market are very important for understanding the present situation in Turkey:

- i. There is a high rate of population growth and a large population.
- ii. A large proportion of the population lives in rural areas and work in agriculture with low productivity.
- iii. As a result, there is a serious employment problem, with the unpaid family workers having a special weight in the economy.
- iv. Transformation of the population to the cities and replacement of agricultural employment with waged work in industry or services in the formal sector, namely 'workerisation' has not been accomplished due to insufficient development of job opportunities in the formal sector.
- v. Hence the job-creating capacities in the cities and industry are limited.
- vi. There is, thus, also a serious unemployment problem in the cities.
- vii. The labour market is segmented in several ways.
- viii. Labour is heterogeneous with large wage differentials.
- ix. The economy and the labour market are somewhat insensitive to trade cycles.
- x. The inadequacy of new job creation is more important for the Turkish labour market than the destruction of jobs (Bulutay, 1995, s.61).

Briefly, Turkey's labour market is characterised by low employment rates, reflecting a large non-participation and relatively high unemployment and declining labour force participation rates (WB 2006, s. 61).

To further understand the situation in the Turkish Labour Market such factors as the demographic profile of the population, the significance of the informal sector in labour force participation, the level of education and degree of unemployment in the country, and last but not least the reasons and consequences of internal migration should be mentioned briefly.

### 1.1 Population:

The relatively young and dynamic population of Turkey was estimated at 72.0 million as of 2005 with a median age of 24.8 years. Little less than one third of the country's population is below the age of 15. According to the General Census of Population (2007) conducted by the TÜİK (State Institute of Statistics), Turkey has a population of 70,586,256 of which 35,209,723 are females and 35,376,533 are males. 70.5% of population lives in urban areas. The rate of annual population growth being 1.83% in 2000 has dropped to 1.24% in 2006.

The figures from the 2000 Census confirm the conclusions drawn in a seminal study conducted in 1995, that Turkey had entered a period characterised by a definite and irreversible decline in the rate of population growth. Based on the assumption that replacement levels of fertility will be reached around 2005-2010, that study predicted that the population would stabilize somewhere between 95 and 98 million by the middle of the 21st century (Tunalı, 2003, p.28).

When fertility rates come down fast, age composition of the population undergoes dramatic changes. Examination of the likely evolution of the age structure of the population in 1990 and beyond reveals a dramatic rise (from 44 to 52 percent by 2010) in the share of individuals between the ages of 20 and 54. The equally dramatic fall (from 35 to 26 percent) in the share of the youth (0-14), combined with the increasing (from 4 to 6 percent) but still small share of the elderly (65 and over), point at a favourable dependency profile (Tunalı, 2003, p.28).

Table 2: Demographic Indicators in Turkey

	2005	2006	2025	2050
Total fertility rate (per woman)	2.19	2.18	1.97	1.79
Expectation of life at birth (year)	Males: 68.9 Females: 73.8	Males:69.1 Females: 74	Males: 71.8 Females: 77.1	Males: 74.3 Females: 80.4
Population increase rate (%)	1.26	1.24	0.74	0.30
Mid year population (thousand)	72 065	72 974	87 756	96 498

Source: TÜİK Turkey's Statistical Year Book 2006, p.74-75

### 1.2 Labour Force Participation and Informal Sector:

In 2006, total labour force at age 15 and over was 24,776,000 and the overall labour force participation rate is 46.8%. Of total labour force, 6,480,000 are females and 18,297,000 are males. One in every four in total labour forces is a woman (26.1%). Labour force participation rate is 24.9% for females and 71.5% for males.

Important labour market characteristic of the Turkish labour market is related with the informal sector. The informal sector is large and growing in Turkey. Since there is neither a common definition for the informal sector nor a common approach to measure it, there are sizeable differences among the estimates. Studies conducted in the early 1990s suggest

that the size of the informal economy was in the range of 7-23% of GDP. Recent studies seem to indicate that the informal sector has expanded. For example, a study by IMF conducted in 2003 estimates the size of the informal (unrecorded) economy between 25 and 33% of GDP. Based on a comparison between employed persons registered at social security institutions and actual employment measured by the LFS, the informal (unregistered) sector is estimated to represent around 52% of total employment and 35% of private sector employment without agriculture (OECD, Economic Review, 2005). Another important characteristic of Turkish labour market is related with the weight of the public sector. The public sector has been an important source of employment generation, but its role in the labour market has gradually diminished over time. In 2002, 15% of the workforce was employed by the public sector (17% of males and 11% of females).

*Table 3: Situation of the Labour Force during 1995-2006*

	1995		2000		2005		2006	
	Rural	Urban	Rural	Urban	Rural	Urban	Rural	Urban
Total labour force	11 853	10 714	10 902	12 176	10 167	14 398	9 894	14 882
Female labour force	4 446	2 043	3 809	2 379	3 310	3 043	3 237	3 243
Male labour force	7 407	8 672	7 093	9 797	6 857	11 356	6 657	11 640
Total labour force participation rate (%)	66.2	45.5	58.7	44.1	53.1	45.5	52.2	45.5
Female labour force participation rate (%)	49.3	17.1	40.2	17.2	33.7	19.3	33.0	19.9
Male labour force participation rate (%)	83.3	74.5	77.9	70.9	73.5	71.5	72.2	70.8
Not in the labour force	6 053	12 835	7 679	15 454	8 981	17 279	9 057	17 835
Females not in the labour force	4 567	9 871	5 669	11 439	6 506	12 759	6 560	13 028
Males not in the labour force	1 486	2 964	2 011	4 015	2 476	4 520	2 497	4 807

Source: DİE, HLFS October 1995, TÜİK, HLFS 2005, p.12-13, HLFS 2006, [www.tuik.gov.tr](http://www.tuik.gov.tr)

*Table 4: Distribution of Employed Persons by Economic Activity 1995-2006 (thousand)*

	Total Employment			Females			Males		
	1995	2000	2006	1995	2000	2006	1995	2000	2006
Total	20 912	21 580	22 330	5 976	5 800	5 810	14 935	15 780	16 520
Agriculture	9 205	7 769	6 088	4 255	3 508	2 816	4 950	4 261	3 272
Share	44.0%	36.0%	27.3	71.2%	60.5%	48.5	33.1%	27.0%	19.8
Industry	4 600	5 174	5 674	572	763	872	4 027	4 411	4 802
Share	22.0%	24.0%	25.4	9.6%	13.2%	15.0	27.0%	27.9%	29.1
Services	7 106	8 637	10 569	1 148	1 529	2 122	5 958	7 108	8 446
Share	34.0%	40.0%	47.3	19.2%	26.4%	36.5	39.9%	45.0	51.1

Source: TÜİK HLFS October 1995, 2000, 2006

### 1.3 Education:

Educational attainment of the labour force is quite low in Turkey. Over 60% of the labour force has primary or less than primary school education. The proportion with higher education, on the other hand, is limited to 10%. In urban areas educational attainment is higher with 45% of the participants having primary or less than primary school education. Those with higher education in urban areas are recorded at 16% in 2002 as opposed to 3% in rural areas. In 2002, while 47% of the male participants had primary or less than primary school education, the corresponding rate for women was 36%. Likewise, while 13% of men had higher education, this figure was recorded at 26% for women. The higher education levels of the urban female workforce stems not from the better educational attainment of the female population but rather because it is the more educated women who choose to enter the labour market. In this sense, the low educational attainment of women is an important impediment for their labour market entry (DIE, 2003).

Comparing education according to the age and sex, there are some important points: (i) Younger cohorts have consistently done better than older ones; (ii) Females have registered bigger gains at all age groups; (iii) The gender gap is smaller for younger cohorts. The gender gap is highest for people in their 50s (more than 2 years) and is less than one year among the youngest (Tunalı, 2003, p.36).

Another problem related to access to education by gender, rural/urban and social background (such as enrolment, dropout and graduation rates) still exist (12.5% of the population is illiterate - 4.7% of men and 20.1% of women). In addition, there is a strong bias towards general education in the system, and despite considerable efforts by public authorities to increase participation in vocational training (VET), it is not an attractive option for secondary education students (only 35% opt for VET) (ETF, 2006, s.7).

Table 5: Unemployment by Educational Status 2006

	Unemployed females (thousand)	Unemployment rate (%)	Unemployed males (thousand)	Unemployment rate (%)
Illiterate	12	1.4	43	10.4
Below high school	264	7.7	1 147	9.8
High school and equivalent education	257	22.1	431	10.3
Higher education	137	13.0	156	7.8
Total	670	10.3	1 777	9.7

Source: TÜİK HLFS, [www.tuik.gov.tr](http://www.tuik.gov.tr)

### 1.4 Unemployment:

At present, Turkey is in a historical process of transformation where employment shifts from agriculture to industry and services still continue. Linked to this process, it has experienced increasing unemployment in the last two decades. Leaving aside marginal drops in the early 80s and 90s, the rates of unemployment in Turkey is on continuous rise throughout the planned period. Specific factors contributing to this picture can be listed as rapid population growth, poor arrangements regarding labour markets, weakness of vocational training, high rates of urbanisation observable from the early 50s, obstacles in front of investment that may generate employment and low levels of productivity and economic growth (Tunalı, 2003).

Between 1988 and 2000, the annual unemployment rate in urban areas of Turkey remained fairly stable for males and has been on a declining trend for females.



Unemployment rates have been considerably lower in rural areas. Mainly as a result of migration to urban areas, the rural labour force dropped from 11.4 million in 1990 to just under 10 million in 2000, and continued to shrink in 2001. Over seventy percent of the rural workforce was employed in agriculture in 2001. Due to weaker qualifications needed for employment, rural residents are less likely to be unemployed. While women have traditionally been economically active in family-owned farms, young men have sought casual work outside agriculture to supplement farming income. Starting with 1999 the cuts in agricultural subsidies and competition from imports appear to have put more pressure on agricultural men to seek for jobs (Tunalı, 2008, p.44).

Table 6: Open Unemployment 1995-2006

	Unemployed (thousand)		Unemployment rate (%)		Non-agricultural unemployment rate (%)	
	Females	Males	Females	Males	Females	Males
1995 (October)	512	1 143	7.9	7.1	21.1	9.0
2000	387	1 111	6.3	6.6	13.5	8.4
2005	652	1 867	10.3	10.3	18.8	12.4
2006	670	1 777	10.3	9.7	17.9	11.3

Source: DİE, HLFS, October 1995, TÜİK, HLFS 2005:12-13, HLFS 2006, www.tuik.gov.tr

Turkey did not have any unemployment insurance system until 2000, and other mechanisms such as severance pay were considered as a form of protection and insurance against unemployment. The unemployment insurance legislation was enacted in 1999 (No 4447), and started to provide unemployment benefits in March 2002. Enrolment in the unemployment insurance scheme is compulsory for all workers covered by SSK (about 6 million workers in 2004). In June 2000 a special fund, the Unemployment Insurance Fund, funded by contributions from workers, employers (as employer, the state's contribution on wages is only 1%) was established to cover unemployment benefits, and health, job placement and training expenditures of the unemployed.

A worker becomes eligible for unemployment benefits if s/he has made contributions to the fund for the last 120 days and for at least a total of 600 days in the last three years. The duration and level of unemployment benefits are a function of payments made by the worker. The workers can receive benefits (50% of net average wage in the last four months with a ceiling corresponding to the minimum wage for young people) for a maximum of 300 days.

From around 55,000 in 2003 the number of beneficiaries increased to about 70,000 on average in 2004 and there were 90,200 people receiving payments as of October 2005 representing only 11% of the registered unemployed. Unemployed not receiving benefits can benefit from training and job placements offered by ISKUR, as will be explained below (JAP, 2007, p.38).

### 1.5 Internal Migration:

According to a report published by Turkish State Planning Organisation (SPO) called "Internal Migration in Turkey and the Characteristics of the Migrants, 1965-2000" during this period a total of 21 million people have migrated between different cities. It is claimed that almost half the population during those years have migrated.

The principal feature of the economic development of the 1950s was the post-war re-ordering of the international economic system under principles of market liberalism. At that time, Turkey was advised to abandon its industrialisation projects. The social impact of

such a change of policies had been neglected and attention was directed to a transformation of the agricultural sector. The introduction of mechanisation in agriculture led to a rapid increase in areas under cultivation and in agricultural output. There was a general under-employment created in agriculture which constituted the push factor. On the pull side, the growth of light manufacturing industries in the urban areas created improved prospects of employment.

For individual families, the process of migration can be described as 'chain migration'. First one person, usually an unmarried male, moved as a 'pioneer' and then other members of the family, wider kin and village community followed. Although, the pioneer initiated the migration process, the decision to migrate was mostly taken at a household or family level. When sons decided to find employment in the cities, their fathers might protest at first, claiming that this would lead to family disintegration, or the loss of family norms and values. On the other hand, some fathers strongly encouraged their sons to migrate to the city to find a job or to get educated, seeing it as a way to leave poverty behind. Older women usually opposed the migration decisions in their families. Most women moved to the cities through marriage, again mainly upon the decision of their husbands.

Upon arrival in the city, the pioneer first sought refuge in the house of a relative or village-mate. Often this was in the squatter housing areas (*gecekondu*) surrounding the urban centres. A place had to be found within this network given that the state had no policies of providing housing. The state institutions functioned as if there were no housing problem, since individuals seemed to be able to solve their housing problems themselves (Rittersberger-Tılıç and Kalaycıoğlu 1998). Almost all the squatter housing that migrants used however, was illegal and built on land owned by the state or by private, absentee, land-owners.

The migrants' demands were first for shelter, then for a regular income and, finally, for a better share in health and educational opportunities. Due to a lack of resources, the Turkish welfare state was able to provide only limited social benefits, and the demand was too great to be easily met. Thus it was that individual strategies and family/kin networks of economic and social solidarity, became the primary sources of support.

About 70% of the population of the metropolitan areas of Istanbul, Ankara and Izmir, 34% of the whole urban population of Turkey, live in *gecekondu* areas (Sönmez 1996). Of the total housing stock, 22% is located in these areas (Sönmez 1996). They lack major infrastructure facilities such as drinking water, sanitation, public transportation, roads, electricity and gas pipelines. The resulting problems are immense and not easily solved through public investment. Therefore, following the decision to migrate, choosing a site for a house, buying building materials for construction, and dealing with municipal authorities for the provision of electricity and water, were all accomplished through a complex network of mutual aid within the extended family network. Later on, this continued when migrants sought a job for the household head, schools for their children and, even later, jobs for their adult children.

Socially, rural migrants living in the *gecekondu* areas suffered, and still suffer from exclusion, segregation and discrimination. However, by developing survival strategies, such as clientelism and family pooling, they have become a distinct part of the culture of the larger cities.

After discussing the factors determining the Turkish Labour Market, the mechanisms for monitoring and regulating the labour market, especially in large metropolitan cities of Turkey, have to be analysed.

## 2. Institutions and Regulations of Monitoring Turkish Labour Market

Turkey's labour market regulations are largely designed for a labour force consisting of one full-time wage earner per family who stays in the same job for the entire working life. High severance pay is designed to protect workers from the risks that come with being fired. Restrictions on temporary work are designed to prevent employers from using workers not covered by pensions or severance pay. And a low retirement age requires high social security taxes, inducing informality.

Talking about monitoring the labour market first of all, the social security system in Turkey has to be explained which is composed mainly of two different programmes. The first one comprises social assistance and social care services targeting elderly people without any caretaker, widows and orphans of deceased persons and children in need of protection, as well as help to families in need for the education of children, help for the pregnant women, help with health care needs (a Green Card Scheme is implemented for the poor and unemployed to access to health services) financed by general budgets, local governments, various foundations and voluntary organisations. However, the GDP share of related expenditures is only 1% and assistance and services provided under this scheme is too limited.

The second programme is the premium or contribution scheme arranged on the basis of social insurance. The premium system is essentially financed through the contributions of persons covered and based upon the principle that benefits run parallel to what has been contributed. The system is managed by three major institutions in Turkey at present (though it will change by September 2008, with the start of new Social Security and Social Insurance Law): Civil Service Retirement Fund (ES), Social Security Institution (SSK) and BAG-KUR for artisans, shopkeepers and other self-employed persons. Apart from these major institutions, there are also various funds that can be regarded as professional social security arrangements and private life insurance schemes based on the voluntary engagement of individuals, but the share of this second group in the overall security scheme is very limited.

Table 7: Membership in Social Security Institutions, 2003 (WB, 2006, s.68)

Membership Status	Number of workers	%
Social Security Institution (SSK)	5.551.000	26.2
Retirement Fund (ES)	2.177.000	10.3
Bağ-Kur	2.455.000	11.6
Private institutions	22.000	0.1
Not registered	10.944.000	51.7
Total employed workforce	21.149.000	100

The new Turkish labour law was adopted in 2003. The new labour law is expected to increase the flexibility of labour markets because of three factors:

- First, the new law legally provides extensive flexibility to small establishments. Although it has retained most of the articles of the employment protection law, it restricted the coverage of employment protection by excluding those establishments employing fewer than 30 workers (Law No. 4773 excluded only those employing fewer than 10 workers).
- Second, by establishing a special Severance Payment Fund (SPF), that covers all severance payments and to which firms are required to pay a certain proportion of the wage bill, the new labour law would reduce the cost of layoffs thus firms' hiring

and firing costs.<sup>7</sup> However, due to strong disagreements between social partners and the government, the law on SPF has not yet been submitted to Parliament

- Third, the new labour law provides a legal basis for “atypical” employment relationships (part-time and fixed-term employment) that were not defined by the former labour law and some flexibility, under the OECD definition, for temporary employment. For fixed-term contracts, the law does not impose any restriction on the maximum cumulative duration or renewal. Moreover, the new law allows, with the written consent of the worker, temporary transfer between enterprises belonging to the same holding company, or between different companies if the worker is employed in a similar position, up to 12 months in total.

The Turkish Employment Organisation (ISKUR) was established by law in 2003 following the closure of a previous institution IIBK (*İş ve İşçi Bulma Kurumu/Work and Employment Organisation*), which was considered to be unable to keep up with the changes in the labour market. The main responsibilities of ISKUR set out in the law are:

- to help job-seekers to find jobs and to help employers to find workers;
- to provide job and career counselling services and training programmes for improving job search methods through vocational information centres;
- to implement active labour market programmes (in addition to usual training and employment services);
- to implement passive labour force programmes. A law on unemployment insurance was approved on 25 August 1999 and the first unemployment contributions have been paid since June 2000;
- to regulate private employment agencies and the employment of foreign nationals in Turkey.

İŞKUR opens various courses for vocational training of the adolescents as well as youth in later ages. İŞKUR is responsible for developing an effective vocational education and training system which will depend on its congruence with the dynamic forces of the labour market and its respect for the culture it serves. Labour market dynamics depend on the needs of industry and commerce (the demand side) and the availability of trained individuals (the supply side) to meet current demands and to adapt to future demands. İŞKUR, is working closely with the Ministry of Labour and Social Security of Turkey, in developing new policies for increasing the employability of young persons through better vocational education and training. According to a project just started by the Ministry the management system of vocational education in Turkey will completely change. They propose that in the future, the management of the vocational educational system in Turkey will gradually be decentralised. One of the key areas of decentralisation will be the labour market and skill needs analysis. As experienced by other countries, the major understanding of the new policy in Turkey is that, the tuning of vocational education to local needs is essential for its labour market relevance. If this is neglected, educational quality is likely to drop, industry will lose its confidence in the outputs of the VET institutions and the institutions will become less and less attractive for students. There are complaints of employers about the quality of graduates of higher vocational colleges which does not meet labour market needs. Hence the programme considers that the complaints

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<sup>7</sup> As a result of the change in the severance payment system, the OECD EPL index for Turkey is expected to be much less stringent.

of the employers need to be investigated and the higher vocational education ought to be adjusted accordingly. On this level however, it is argued that there is an apparent need for up to date labour market information at the provincial level in order such a program can be activated to match the skills of the unemployed youth with the needs of the local employers and to develop appropriate regional labour market strategies for Turkey. Also another concern of the program is with the 'hidden unemployment' which is thought to be hidden in 'unpaid family labour' category. It is said that it should be examined whether the family work generate income or not, and whether the unpaid workers are currently searching for work. Data about this aspect is needed for monitoring labour market in Turkey, since unpaid family work has always been taken for granted and keeps the unemployed persons hidden within family support system.

Besides such formal programs and implementations by the state, there are also many Non- governmental organisations who also work on these lines of increasing the employability of mainly of young women in Turkey. They can open literacy courses as well as courses for garment making, carpet weaving, doll making and many other occupational and income earning skills. There are also many different microcredit systems for women who can start their own jobs with a small capital. The Social Assistance System also has such a program for rural women who can start a small husbandry project of their own with a small credit from the state.

### **Conclusion:**

Main problems and/or challenges related to the labour market of Turkey can be summarised as high female unemployment, possibility of employment in the informal sector, low labour productivity, existing of disadvantaged groups like uneducated youth, women and migrants, youth unemployment and regional disparities in employment. Two of the main challenges for job creation in Turkey – creating new jobs and reducing the size of the informal sector – require that close attention is paid to the tax and social security system. About the informal sector, although on the one hand, it is argued that it offers indecent forms of employment with no insurance, unregistered workers, low pay and bad and uncontrolled working conditions, it provides a solution to unemployment and poverty on the other hand.

The main challenge for the Turkish workforce is to move from agriculture-based low educated levels to service oriented middle to high education level. Over the past decade, Turkey has pursued a striking education reform agenda focused on implementing eight-year basic and compulsory education and dramatically increasing the participation of girls at the primary education level. A challenge remains to close the gap in participation between boys and girls.

Another challenge is that a new reform programme has started by the Ministry of Labour and Social Security about restructuring vocational education in Turkey which is a long needed implementation. Especially the considering of local and provincial labour needs will be a basic change.

The change in the pension reform is also another challenging reform project although much resisted by the trade unions in Turkey. This new pension reform brings incentives for middle- aged persons to remain in the job and discouraging early retirement. This may be an actuarial reduction to the pensions scheme but on the other hand a threat in a society where the demographic profile of the labour force is very young. Hence the gainfully employed will keep their jobs until late ages but the may cause a long unemployment cycle for the new comers. On the other hand, there has been a new law passed which

encourages the increasing employment of the young persons and women by the employers where the government will pay the social security contributions of the employers for these workers.

All in all, labour market monitoring process has to deal mainly with the factors of demographic profile, level of formal and vocational education, causes and degree of unemployment, employment opportunities, formal – informal balance, regional differences and local needs, and the situation of disadvantaged groups like youth, women, migrants, in the labour markets as well as the demands from the employers. New and diversified data and information about better assessment of the situation in the labour market is also a major challenge for Turkey.

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## **Problems of Migrant Labour-Force on the Regional Labour-Force Markets in Russia**

*Marina Kargalova*

Migration is a global process enveloping the whole European territory. Some countries participate in it as donors, others as recipients, yet others as transit territory. Today the migrants form an important component of labour force practically on all regional labour markets. In particular this concerns regions where there are mega polices and large industrial enterprises. The aim of each regional labour market is to receive and adopt the migrant labour force. And what's more, the number of labour immigrants and their qualification must be counted well.

The migration torrents are crossing the Europe and have an influence on the situation in all European regions. It brings pressure on market infrastructure, on the social fabrics of society. Their potential, the possibilities they create and menaces they evoke are of the number of the most complicated problems for modern Europe.

A wide and permanently updated base, statistic accounting, and monitoring of labour force migration play an important role in the resolution of employment problems and labour market regulation, including the structure of labour market.

The EU has managed to build up a domestic market and to solve a lot of problems connected with it by using the resources of information space. The functioning EURES and TESS systems have contributed heavily to the process. However, labour force migration also creates problems in the recipient countries in the EU as well as in Russia. It is only recently that Russia has known the phenomenon of labour force migration. It is especially prominent in the region of Moscow. It is there that an unprecedented flow of labour migration, mostly illegal, is pouring from the East and South regions.

It is evident that the migrant problems in Russia must be studied in the context of global migration processes. The special aspect must be done on the process of social adaptation, including conditions of labour contract, language study, vocational training and participation in the political and social life. I think that the other countries' experience can be applied in Russia.

The majority of labour migrants come to Russia from Ukraine (1 million people), Azerbaijan (1 million), China (800 thousand), Uzbekistan, Vietnam, and Moldova. This could not adversely affect the living standard, the possibility to control this labour market, the budget of the region, and has brought about capital outflow and social instability. In addition to 350 thousand legal migrants, there is over 1,5 million illegal immigrants in Moscow. The losses from using such labour force annually account for \$ 1,5 billion. \$ 400million goes to the illegal economy and to accounts in foreign banks. The state budget loses the same amount as unpaid taxes. About \$ 200 million are used for bribing corrupted officials. At least half a billion of US dollars are taken away from Russia as money wages. Altogether, guest workers in Russia sent to CIS countries \$ 1,87 billion in the first half of 2007. According to the forecast of the Bank of Russia the amount of transfers by the end of the year may exceed last year's record of \$ 3,55 billion. According to the same evaluations, money transfers from Russia to Georgia amount to 26% of the GDP of the country and 30% in Moldova.

The Migration Service and Employment Agencies have not yet been able to establish order in the area. Attempts, of course, are being made, the Government takes certain

measures to establish control over illegal immigration, in particular, to simplify legalisation, to deport from the country persons who violated law. However, the measures affected several thousands of immigrant-workers while there were in fact many hundreds of thousands of them. This is an unaccounted and unpredictable labour force who aspires to come to Moscow region and often further, to the West.

The pressure of migration flows on the infrastructure and social substance of the society, possibilities created by them, as well as threats to security caused by them, constitute the most complicated problems with which not only modern Russia deals. Working out of a substantial strategy and mechanisms of controlling migration flows which pour into regional labour markets is the demand of the times.

The migration policy carried out by the EU member-states is guided by common regulations. And though the situation in Russia and the needs of the country are fairly specific, Russia is to carry out the task of controlling the migration of labour force together with the EU. This is important from the point of view of both adapting to the Shengen regulations and extension of the space of freedom, security, and law to Russia. However, calls for visa-free entry and open access of labour force from Russia to EU labour markets are inopportune without adopting a set of administrative and financial measures, as well as investment into material re-equipment and upgrade of checkpoints, establishment of regulations and standards on regional labour force. Only a strategy built upon a complete and accurate information basis is capable of regulating this process.

It is a fact that Russia lacks objective monitoring and its information basis is weak. There are attempts to regulate the flows of migrant workers. But the process is difficult. It seems that an important task is to supply the labour force coming through any channels with information about demand and supply in the regional labour markets.

In Moscow, the majority of the so-called "guest workers" find jobs on spontaneous labour markets. Crowds of migrants line up along the perimeter of MKAD (Moscow ring highway), and employers, mainly from small holdings, drive up and choose the required number of workers. Very often the people do not get any information on the conditions of work, nobody concludes with them agreements guaranteeing their rights. Among the people there are Ukrainians, Moldavians, Uzbeks, and Tadjiks.

The people are not just low-skilled workers, sometimes they are specialists with university diplomas, engineers, builders, designers etc. For instance, there was a Ph.D. from Erevan among the Armenians who asphalted the floor and exit of my garage. Of course, all of them come to Moscow because of the disastrous situation in their countries, absence of jobs and a living standard that is very low even compared to Russia.. But the problems do not disappear; the level of social tension is increasing.

I think that a number of developed European regions also had similar problems, especially after the Balkan events that brought about waves of uncontrollable immigration. The latest events in Spain, Romanian problems in Italy and many others may also be mentioned.

Processes concerning the formation and regulation of regional labour markets take place in the course of globalisation and European integration as its integral part. They require close international cooperation in this field, consolidation of efforts in the resolution of common problems: regulation of regional labour markets and, which is not less important, provision of social security for migrant labour force. In this respect, immigrants are the most vulnerable and the least informed part of labour force. Information as background can play its role.



Access to information would regulate both the supply of and the demand for labour force and in addition, would equip migrants with the knowledge about their social rights. The creation of such information blocks, as well as well thought-out methods of their dissemination may become efficient instruments for solving these problems, at least partially.

The information network will make it possible to prepare jobs in advance and define the ways of migrants' movement. There is another problem, though: the migrants are often unable to perceive up-to-date information because of the level of education and skill. The task for social structures and scientific centers is to think over and work out accessible means of delivering information and its dissemination.

Region should clearly understand what workers they need and in what quantities. The ability to use innovation, including informational and social, depends on the innovational culture of society. The main difficulty consists in the deep differences in the educational levels, quality of life, and work pays between the countries on the supply side and those on the demand side. But this is not a regional but a global problem, and an important role in its resolution belongs to the potentialities of informational society. European integration is more than economic integration. Processes of rapprochement and mutual penetration are taking place in social and political spheres. And a new way of managing labour markets should be based not on hierarchy but on dialogue, mutual tolerance, and mutual understanding.

As for Russia, of the greatest important to us is the experience of the European Union, its regions in the field of collection and treatment of information on the formation and management of labour markets. I believe that new member-states from Eastern and Southern Europe are also interested in EU assistance. Having created cross border regions, Russia has become involved in this process. Now it is quite realistic to intensify the cooperation on the basis of such documents as the General Strategy of the European Union with regard to Russia (1999) and the Strategy of the Russian Federation and the European Union for a mid-term Perspective (2000 – 2010). The European Union has committed itself to preparing a list of respective instruments and measures related to extending European programmes to Russian regions that are of special interest to the European Union. It should be noted that this work has begun, along the lines of TACIS and Collaboration Program.

It is the potentialities of information society that may contribute to balancing regulatory initiatives. In particular, this concerns the formation of labour markets and managing them. Of great importance is the monitoring of the programs of INTERREG, TACIS, FARE, in the part dealing with projects of cross-border cooperation and their further unification (North-Kolarctic, Euroregion Karelia, South-Eastern Finland-Russia, the regional program of Baltic Sea, Estonia, Latvia, Russia, Lithuania etc.). 9 of the 49 near-border subjects of the Russian Federation participate in the work on Euroregions: the Republic of Karelia, Krasnodar, Belgorod, Briansk, Voronezh, Kursk, Pskov and Rostov regions, as well as over 30 municipal areas.

In Russia this process encounters great difficulties because the level of technological equipment of the population is so far much lower than in the countries of the West.

An important and cost-effective way to make a valuable contribution to sustainable economic growth is the large cooperation of all European countries for formation and regulation of regional labour markets, decision of labour migrant's problems. The question is not to choose between a free market Europe and a social Europe but to build a well organised social- oriented market economy and to ensure a high living level for all, including migrant labour-force.

## National Strategy of Bulgaria on Migration and Integration – 2008-2015

*Atanas Chaushev*

There is a certain gap in the availability of statistical and analytical data, as well as specialized studies on the topic of migrants in Bulgaria, which has its historical and economical reasons, although currently the processes and trends regarding the migrants' issues has undergone a serious transformation in Bulgaria as the number of migrants in the country has substantially increased. There are non-government organisations that have conducted research projects with the clear view that clearing away of the wrong concepts about the migrants is a key to the overcoming of racial and ethnical stereotypes and prejudices.

Bulgaria has adopted in various acts of its legislation certain issues concerning the national migration policy.

The overall objective is the establishment of a political and social background which promotes the creation of management models and methods for elaboration, adoption and application of contemporary migration policies.

The main document on which migration policies are based on in Bulgaria is the National Strategy on Migration and Integration – 2008 – 2015 (Strategy).

The successful management and regulation of the migration and integration processes are considered as the key instruments for the redistribution of the workforce in the development of the globalizing economy.

The formation and implementation of Bulgaria's migration policy is closely bound to the national interest and fully synchronised with the EU's policy and practice in that field, which derives from the country's obligations under the Accession Treaty.

Like the other member states which joined the EU during the Eastern enlargement, in a short period of time Bulgaria changed its profile from a country that exports migrants to a country that imports such.

On the Bulgarian labour market currently there is already shortage of labour force in some specific economic sectors, which creates the need of well balanced reception of workers from other countries.

The National Strategy on Migration and Integration is closely bound with the National Employment strategy, the National Strategy on Demographic Development and the National Housing Strategy.

*There are three target groups that have been monitored in the current Strategy: emigrants of Bulgarian origin in foreign countries; Bulgarians returning to Bulgaria after certain migration period in foreign countries; and foreigners who have immigrated in Bulgaria.*

The *first chapter* draws important conclusions on the condition of, main trends in and the challenges for the development of the migration processes in Bulgaria.

In revealing the dynamics, structure and trends in the past years of the migration processes in the country, the Strategy presents a review, analysis and characterisation of the following aspects of that processes:

- the number of Bulgarians abroad and the Bulgarian communities around the world including common trends and challenges of the *emigration of Bulgarians* as well as the *immigration of foreigners in Bulgaria*; return of Bulgarians who have emigrated in the previous periods of time and the permanent settlement of both groups in Bulgaria;

- the growing number of individuals of Bulgarian origin living abroad and seeking to acquire Bulgarian citizenship;
- the factors that stimulate the emigration and the factors that limit it, including the influence of one of the main principles of the Common market - the free movement of people in the EU;
- the trends in the Community Migration Policy.

The *second chapter* focuses on the approach, target groups and main principles in the process of carrying out the Strategy:

- irreversibly Bulgaria slowly has become an immigration destination, which is as a result of the good economic indicators and business perspectives, low unemployment rate, although the population is still decreasing;
- the national interest requires the establishment of active measures and legislative initiatives to attract foreign citizens of Bulgarian origin;
- because of the shortage of labour force in certain economic sectors a balanced acceptance of migrants would render an important contribution to country's economic development;
- the acceptance and integration are issues with many aspects in the context not only of the economic development but also of the integration policy of different social groups and the measures against illegal immigration and employment;
- the Bulgarian migration policy is based on the principles of human rights' protection, democracy, rule of law, as well as principles as respect, tolerance and appreciation of the positive contribution of the migrants as an important part of the Bulgarian society.

The *third chapter* presents the strategic objectives and the priorities in the Bulgarian migration policy:

- Strategic objective 1 – Attraction of individuals with Bulgarian citizenship who have settled abroad and individuals of Bulgarian origin with foreign citizenship – for permanent return and settlement in Bulgaria;
- Strategic objective 2 – Achievement and conduct of an adequate policy on the acceptance and integration of foreigners and carrying out of an effective control over the migration processes.

And the last *Fourth chapter* reflects the capacity, application, coordination and accountancy of the results of the carrying out of the Strategy on Migration and Integration.

*For the purposes of the current Anthology it would be appropriate to reveal deeper aspects of the Strategic objective 2 of the Bulgarian National Strategy on Migration and Integration.*

The results from the monitoring of the current state of the Bulgarian labour market confirm that in certain economic sectors and administrative regions there is insufficiency of specialists, which hinders the overall development of the economy of the country.

In the same time other EU member-states' experience clearly show that large-scale acceptance of migrants is not a good solution, therefore it should be avoided. As more adequate approach is seen the balanced acceptance of citizens of third countries with the implementation of regulatory rules for their return in the country of origin, after their work contracts have expired. This is the practical implementation of the Community initiative for

facilitation of the “circular” migration<sup>8</sup> and preventing the “brain drain”<sup>9</sup> from the countries of origin.

After accession to the EU, the term “foreigners” in Bulgarian legislation is applied only for third country citizens. Citizens of the EU, EEA and Switzerland are not regarded as foreigners in the terms of the Bulgarian legislation.

### **Priorities:**

*Priority 1 in that strategic objective is the balanced acceptance and achievement of a successful integration of foreigners.*

There is a National Programme for integration of refugees – adopted between 2005 and 2007 and due to endorsement for 2008-2010. The Programme is implemented successfully and its scope of application could be widened for bigger groups of migrants.

There are several national programmes that facilitate the foreigners in finding a job, and accommodation, getting an easier access to education, health and administrative services – all aiming at the long-term integration and adaptation of the foreigners, including the members of their families, in the Bulgarian society with respect to preserving their cultural and ethnical identity.

The programmes are regarded as a strategic investment in the economic and social well-being of the society as a whole. Both elements are important in the integration politic – acquiring knowledge of the Bulgarian language and culture and respecting the language and culture of the migrants.

*The National Strategy on Migration and Integration sets several common principles for integration of migrants in Bulgaria:*

- the integration is a dynamic, long-term and “two-way” process of mutual adaptation of both sides – immigrants and citizens of the host country;
- the integration requires respect of the basic values of Bulgaria;
- the employment plays a key role in the integration process;
- basic knowledge of the language, history and institutions of the hosting society is a key element in the integration process;
- to render support in the education process is fundamental for the more successful and active participation in the public life;
- ensuring to all immigrants access to the public institutions is an exceptionally important basis for the integration;
- the interaction between immigrants and local residents is a basic mechanism for the integration;

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<sup>8</sup> Circular migration in global context is used as a triple win discourse promising gains for host countries, home countries and migrants themselves, promising accelerated economic growth, remittances, relative high wages and brain gain, by means of full circles of migration: immigrants should be able to come, go and come back again, without many restrictions and making use of contemporary transnational networks. (Bieckmann and Muskens, 2007).

<sup>9</sup> A brain drain or human capital flight is a large emigration of individuals with technical skills or knowledge, normally due to conflict, lack of opportunity, political instability, or health risks.

- every individual's right for cultural identity should be protected, unless any religious or cultural practices do not contradict to other inviolable rights or to Bulgarian legislation;
- the participation of the migrants in the democratic processes and in the formulation of the integrational policies and measures, especially on local level, enhances their integration;
- the inclusion of the integrational policies and measures in all political spheres and levels of government and public services is a key decision in the process of development and application of state politics;
- for regulation of the policy, for evaluation of the integration process and for more efficient exchange of information there is a need for setting of clear objectives, indicators and evaluation mechanisms.

The following conclusion can be drawn: the policy of acceptance and integration of migrants is built on consensus, achieved between all social partners, the non-government sector, the academic community and after a wide public debate.

The Strategy provides several tasks for the policy on acceptance and integration of foreigners:

- development of a system for monitoring, analysis and forecasting of the labour market's needs for labour force with the objective of carrying out of an adequate migration policy;
- overcoming of the human resources shortage and attraction of immigrants to meet the needs of the Bulgarian economy;
- development of an information system for the qualification structure of the unemployed in Bulgaria, which reflects the education level, as well as the acquired professional qualifications;
- information campaign, which would provide more popularity to the payment levels in Bulgaria;
- creation of a database containing information about the number, educational level, professional qualifications, age, gender, family status of the long-term settlement of immigrants;
- creation of a favourable social and psychological climate for integration of immigrants;
- stimulation of the circular migration in partnership with the countries of origin;
- coordination and information exchange on the migration issues – with all institutions involved, all the partners on a national level, between the EU member-states, with the European Commission, with countries of origin, with international organisations and others;
- strengthening the relations between the business organisations and the Bulgarian diplomatic institutions with the objective of providing adequate information on the working conditions in Bulgaria;
- setting out and sustaining of an appropriate information campaign on migration and integration issues, which would initialize a wide public debate and inform the migrants and the society

- setting out of a mutually lucrative intercultural dialogue, and other tasks.

*Priority 1 - balanced acceptance and achievement of a successful integration of foreigners, contains several directions:*

- screening, analysis and updating of the legislation;
- identification of the labour market's needs for labour force, which is not available on labour market in the long term;
- regulated acceptance of foreigners, which comprises of identification of mechanisms for acceptance and integration of citizens from third countries;
- carrying out of consistent and long-term policy focused on the refugees, asylum and protection seekers.

*Priority 2 of the Strategic objective 2 of the National Strategy on Migration and Integration is achievement of controlled migration and fight against illegal migration*

The prevention of illegal immigration is a primary task the Bulgaria government.

The effective counteraction to illegal immigration requires a complex approach and balanced political measures to guarantee the state security, effective border control, implementation of national legislation on entry, stay and employment of foreigners, protection of migrants' rights in the context of the international humanitarian legislation.

Priority 2 has also several directions:

- effective border control;
- effective fight against human trafficking;
- return policy.

Regarding Chapter 4 - Capacity, application, coordination and accountancy of the results of the carrying out of the Strategy on Migration and Integration there has been elaborated an Implementation plan for 2008 of the Strategy. During the preparation of the Implementation plan the short time limit till the end of the current year is considered; the objective of the Implementation plan is to lay down a good foundation for the carrying out of the whole Strategy, as well to determine concrete steps for updating Bulgaria's policy on migration and integration.

### **Conclusions:**

The successful migration policy achieves and sustains a balance between the state interests in the protection of national security and sovereignty and the protection of migrants' rights to choose to leave their home country and settle in a foreign country. Some analysts go even further: the adequate and effective protection of the migrants is the main prerequisite for protection of national security and social order, therefore both objectives are not to confront each other but should be approached in their interconnectivity.

## Immigration from a European and Social Point of View

*Miguel Bernal*

Migration phenomenon has existed in Europe since centuries. From overbearing or power attitudes, invasions (Roman Empire, Arab Invasion, Austro-Hungarian Empire... World War II); to those of necessity, searching of better life conditions (Spanish people to Switzerland, Turkish people to Germany,... Rumanian people to different European countries); as well as non-necessity attitudes but better life conditions searching (Germany people to Mediterranean Coasts). Nowadays, it is shown as a complex and new phenomenon due to the current circumstances (economic and knowledge globalisation).

Adaptation and acceptance by the native society to the presence of a community of homogeneous culture and customs and quantitatively significant, it is a slow and complex process, as well as it is complex the adaptation process of the foreign community to the recipient society. Due to recent experience (France disorders), this process is not taken as own in the recipient country, neither the first generation nor the second one already born in such country. This fact is reasonably the result of failures in integration and adaptation policies.

The economic personal component of most of the newly arrived people determines the perception that the recipient society has about the massive arrival of foreign people to their countries. Foreign people who have money or those who look for improving their economic condition. In the same way, it has also influence on such perception, the economic situation of economic development or stagnation which has the recipient society (Spanish people in Germany after the World War II... Latin American people 2004-2007 in Spain, town planning boom).

From now on we will refer to *immigrants* as we commonly understand people who look for improve their economic and life conditions.

Whether it is in one way or another, they are different malfunctions: labour market, social services use or social benefits recipients (health and social care... nurseries...) and coexistence. The immigrant community is one of the most disadvantaged one and this is the reason why they have preference in benefits in the recipient society. At the same time, it is one of the most vulnerable communities to labour exploitation or the acceptance of abusive labour conditions due to their situation of necessity.

### Labour Market

In the immigrant community, the incorporation into the labour market is their first objective as working is the main principle for social inclusion.

Regarding to labour market, the arrival of immigrants in economic development periods does not mean great malfunctions due to they are required as non qualified work force or for working sectors which are not preferred by the native working force due to their hardness and precariousness characteristics. Agriculture, construction, hotel business or housework sectors are some examples. It does not happen when there is an economic period of stagnation or crisis, due to the immigrant worker is a competitor in the labour market regarding the native work force that considers it as own.

Recently, one of the most used terms by the European Union regarding immigration is "circular immigration", that is, we ask for immigrants as work force when we need them



and when the work is finished and we do not need them, they should be back to their countries. This point of view crashes head on a perspective focused on the respect to everybody's dignity and worker's and on the rights that they should move as they are human beings. At the beginning of the sixties, a Swiss writer told about the Spanish immigrants regarding to the problems they were generating in Switzerland: "We asked for workers and they came human beings" (Max Frisch).

Nowadays, the European ideological tendency, transferred to the European Parliament, is a right-wing tendency. It leads to deal with immigration from simplistic and utilitarian presumptions; not from progressive presumptions or those regarding to rights recognition with the aim of building a Social Europe. Nowadays, there are signs that corroborate this perception as, among others, the Immigrants Return Guideline passed on June, 18<sup>th</sup> by the European Parliament.

### **Communitary Social Services Users**

Regarding to using services, the arrival of immigrants in a significant number leads to saturating assistance services as the sanitary or welfare ones, and therefore it generates an unease feeling among the native population. This fact is easily surmountable if the competent administration is able to foresee the assistance that citizens will need in order those service quality levels do not fall.

In several European countries, there are measurements or policies addressed to disadvantaged communities as grants or accommodation access... This fact also generates an unease feeling in the native population, and it is even worse among communities that traditionally have been beneficiary of this assistance.

### **Basis Strategies to Deal with the Immigration Phenomenon**

- Experience tells us that a mutual knowledge at a personal level as values, personal attitudes, culture, history... leads to mutual respect among people. At a personal level, all of us have these experiences and it is the effort that should be made at a social or community level: favouring in a common way the *mutual knowledge* of the recipient society and the immigrant population in common spaces. We cannot value what we do not know.
- Immigrant communities in several countries share common characteristics that can be taken into account in order to tackle common social/labour integration policies: language ignorance, recipient society structures ignorance (sanitary or educative ones...), labour laws ignorance... Therefore, all actions in order to overcome these difficulties will help to their integration in an effective way as they can *know better the recipient society*.
- At a communitarian level, the *participation* of the immigrant community in *communitarian entities* as neighbour associations, parent-teacher associations, political parties or trade unions, makes up a net of relationships that undoubtedly leads to their integration in the recipient society.
- It will also help to the integration of this community the possibility of *voting* in the recipient society.
- These strategies would lead to the point that the second or third generation of immigrants do not feel as foreign people in the recipient country, but a citizen more and he will also be perceived in this way by native people.

## 1.2 Monitoring Approaches Evolved in Practice

### Introduction

Monitoring of the integration process for migrants, in particular capturing the integration statuses in regional labour markets in single European regions, is quite meaningful for the political actors that steer these processes. It is shown here, through four examples, how data bases can be built up and how they can be made available completely with appropriate background information. Aftab Hladikova, from the Ministry of Labour and Social Affairs in the Czech Republic, describes how various legal regulations can be used to create a systematic data base over time. This offers current and historical pictures of target group migrants and their level of integration. Aside from the labour market, their conditions in the areas of education and housing are also considered. Using examples from the data, she makes clear how quantitative data can be refined with qualitative data and how possibilities of regionalized evaluations can be developed. Focusing next on the labour market, Jean-Luc Malvache describes how, within the framework of political consulting, public data can be combined with the results from scientific studies. Using concrete examples he offers valuable insights into the complex labour market situation of migrants and thus demonstrates that a regional monitoring can accurately account for the heterogeneity of the target group. Following the path of political consultancy, Franz Clément presents the monitoring activities in Luxembourg. In contrast to Malvache, who focused on one region in Germany, Clément considers the Luxembourgian labour market which stretches far outside the national boundaries. Luxembourg also differs from other Western European countries in that labour market integration is not the main interest, but rather monitoring is used for identifying the future occupational needs in Luxembourg. The corresponding workers from neighbouring countries can then be drawn in, preventing a shortage of skilled professionals. Both examples from political consultancy, given by Malvache and Clément, clearly show that the monitoring approach needs to be customized to structures and needs of the regional labour market they address. Crossborder migration is also in the focus of the fourth example. Ágnes Hárs and Katalin Nagy describe a monitoring approach for the labour market in border regions. Using different types of data they demonstrate how to monitor the border regions between Hungary and Slovakia and provide interesting insights in the broad range of developments. Such data sets could be also considered to be very valuable for political consultancy. Despite the differences between the four monitoring approaches depicted here, there is an unifying element: the information is generated as the basis for decisions by political actors.

## **Monitoring the Integration of Migrants in Regional Labour Markets – Report on Data and Experiences from the Czech Republic**

*Aftab Hladikova*

### **Introduction:**

Persons coming from other countries and residing permanently or on long-term basis in the Czech Republic have been keeping pronounced impact on demographic progress of the Czech Republic. Their share in economic activities and prosperity has been keeping to grow each year along with their growth in number and share in the net population of the country. Integration is a complex process including the social, societal and human dimensions, perceivably, monitoring the labour market integration of immigrants includes the related aspects and dimensions of a life whose appearance in the article is unavoidable.

The article illustrates how the Czech Republic has built up its system of data collection and evaluation, compromising the indispensable of its state integration policy. To measure the progress of integration process and monitoring it demands indicators. However, a monitoring system based merely on numbers is deceptive and incomplete unless the sources for qualitative description. The article has thus stated in brief the two recent sociological researches carried out under the integration policy.

### **In Retrospect:**

The issue of migration of third country nationals and their integration to the Member States of the European Union has become increasingly important, not only for the individual member States, but also at the level of the European Union.

In the case of the Czech Republic this phenomenon demonstrated its conspicuous appearance only at the first half of nineties when as a consequence of comprehensive and total changes in 1989 evoked a steady and significant growth of immigrants who came to the Czech Republic and for diverse reasons intended to live.

For all the issue of immigrant integration is not a new phenomenon in the Czech Republic, however, the fundamentally a new element of it is the decision and effort of relevant state organs of the government of the Czech Republic to affect in the long-run some of the features of migration and integration and pursuit to design plans of useful measures in practice.

In 1999 a fifteen points programme, called Principles of Concept of Integration of Foreigners on the Territory of the Czech Republic was approved by the Government of the Czech Republic, and by virtue of this programme was worked out the Concept of Integration of Foreigners on the Territory of the Czech Republic (hereinafter CIF) and was approved by the Government of the Czech Republic in 2000<sup>10</sup>. The basic premise for

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<sup>10</sup> Until the end of 2005 realisation of CIF was based on mainstreaming method, i.e., approximating the position of legally and long-term residing foreigners to the legal position of citizens of the country, including ensuring the protection of political, economic, social and cultural rights of immigrants, strengthening the tenet of equal access and equal opportunity particularly concerning employment and entrepreneurship, housing, culture, religion and language, education, health care as well as

measuring the effectiveness of all the acquisitions in practice and quality planning in immigrant integration depend merely on collection and evaluation of data on migration and integration and the monitoring of main features and trends of integration.

### **Current Situation:**

Hence in 2000 the Czech Statistical Office<sup>11</sup> worked out a document, called The Fundamentals of Concept of Collection and Evaluation of Statistical Data on Migration and Integration of Foreigners on the Territory of the Czech Republic. Based on this document in 2003 was produced The Concept of Collection and Evaluation of Statistical Data on Migration and Integration of Foreigners on the Territory of the Czech Republic in conformity with international trends of progress in data collection and its evaluation<sup>12</sup>. By virtue of the Concept the Czech Statistical Office has since been coordinating in data entry by relevant organs and institutes on migration and integration. The following organs and institutes are the data sources: the selected Departments of the Ministry of Interior of the Czech Republic, Ministry of Education, Youth and Sports of the Czech Republic, Ministry of Health of the Czech Republic, Ministry of Justice of the Czech Republic and the Ministry of Labour and Social Affairs of the Czech Republic, as well as the Research Institute of Labour and Social Affairs, the Institute of Health Information and Statistics of the Czech Republic, the Institute for Information on Education under the Ministry of Education, Youth and Sports.

Statistical data thus collected and evaluated by the Czech Statistical Office in a current year has thus been published as a publication „Foreigners in the Czech Republic<sup>13</sup>“, both in Czech and English, in the fall of the subsequent year. The first such publication produced by the Czech Statistical Office was in 2001<sup>14</sup>. It is worthy to note that together with the printed publication the data are posted as well in the website of the Czech Statistical Office on quarterly basis.

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participation in public and political life; consistent protection of immigrants against discrimination and xenophobia comprised the integral part of the whole package of the CIF.

<sup>11</sup> The Czech Statistical Office comprises the one of the relevant partners of the realisation of the CIF.

<sup>12</sup> In 2006 the Concept was updated intra CIF, in line with the requirements and standards required by the international organisations of EU and UN. The concept envisages continuous updating and precision in relation to changes in the field of immigrants' integration and their residence in the Czech Republic.

<sup>13</sup> The Czech legal order differentiates citizens of the country from non-citizens by the noun "Foreigner". It is to be noted that in this article "Foreigner/s" is used only when it concerns official documents and it is the synonym to immigrant/s.

<sup>14</sup> The publication has, henceforth, been financed within the scope of the Concept of Integration of Foreigners in the Czech Republic, and the financial resources for the publication are allocated from the budget chapter of the General Fiscal Administration, Item on Integration of Foreigners of state budget of the Czech Republic to the budget chapter of the Czech Statistical Office. The publication is posted at the website of the Czech Statistical Office; otherwise monthly and quarterly basis statistical data has also been posted on the website.

### **Further Progress of the CIF and its Influence on Data Collection:**

So far the immigrant integration policy has been applied on mainstreaming method. In 2006 the Ministry of Labour and Social Affairs of the Czech Republic<sup>15</sup>, besides the mainstreaming method, sets four priority areas as primary groundwork of integration at long-term horizon with an aim to detect the real situation of immigrants and identify the attained outcomes in integration process. The areas are:

1. *knowledge of Czech language,*
2. *economic self-sufficiency of foreigners,*
3. *orientation of foreigners in the Czech society, and*
4. *the relations of foreigners with members of majority society.*

The areas have further been supported by goal-directed specific and supportive measures. The topics of projects financed by relevant Ministries under the CIF and implemented through NGOs are usually set so that they will cover the above stated areas, as per competence of relevant Ministries.

### **Contents of Statistical Data Base:**

Data collection and evaluation include migrant workers as well as migrant trade license holders. Indeed the other aspects and areas of life.

Data collection and its subsequent evaluation covers the following areas:

*Demographic aspects of foreigners* – this area covers the age, sex, family status, present citizenship and citizenship at the time of birth, country of birth, country of birth of parents.

*Information on migration to the Czech Republic:* this area covers the time of arrival, progress in residence status.

*Education, qualification and ability:* this area covers the various levels of education attained by immigrants including the highest one achieved, field of education etc.

*Economical self-sufficiency:* this area includes the economic activities of immigrants, position and types of work performed by immigrants including their share in total labour force of the country.

*Health care of Foreigners:* this area covers the contract health insurance of foreigners as well as drawing health care by foreigners according to country of origin, age groups and way of payment including total cost of health care; in-patient treatment of foreigners according to causes of hospitalisation; abortion of female foreigners by category of abortion and method conducted; abortion of female foreigners by category of abortion and regions; newly reported cases of TBC according to country of birth of ill foreigners.

Other included areas are: asylum and asylum facilities, criminality of immigrants, illegal migration through state border.

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<sup>15</sup> From January 2004 the coordination of CIF and its implementation at national level have shifted from the Ministry of Interior of the Czech Republic to the Ministry of Labour and Social Affairs of the Czech Republic.

### On Data Collection and Evaluation:

Main data sources on immigrant labour force are the Ministry of Labour and Social Affairs of the Czech Republic, Ministry of Industry and Trade and the Czech statistical Office<sup>16</sup>.

Data evaluation is carried out by CZ-NACE; data sorting and evaluation process has, as a rule, been carried out as:

employment and residence permits of foreigners by zones, districts and regions; employment and residence permits of foreigners by citizenship (includes – total as well as in terms of sex); employment of foreigners by municipalities, districts and regions; foreigners registered at Public Employment Service (PES); citizens of the Member States of EU registered at PES; foreigners who are registered at PES – by type of registration in municipalities, districts and regions (that is, it includes the total number of registered foreigners at PES and further sorted out by number of valid work permit holders, thereof, number of employed third country nationals and number of employed foreigners of citizens of EU, EEA and EFTA); foreigners who are registered at PES – by type of registration and citizenship (it further sorted out separately by citizenship of number of employed third country nationals and by citizenship of number of employed foreigners of citizens of EU, EEA and EFTA); total number of workers in main employment (civil sector) in the Czech Republic which further sorts out the share of foreign workers by virtue of work permit holders, self-employed, trade licence holders, partners/associates and statutories; number of workers in main employment (civil sector) by CZ-NACE; number of workers in main employment (civil sector) by CZ\_NACE in percentage; number of workers in main employment (civil sector) as per NUTS2 workplace by region; employment of foreigners by age group and sex (includes third country nationals as well as the citizens of EU); employment of foreigners by nationality and age group (includes third country nationals as well as the citizens of EU); employment of foreigners by zones as per NUTS2; registration at PES and the trade licences issued by the Trade License Offices according to the status ranking of economic activities (CZ-NACE); valid trade license holders by zones, districts and regions; valid trade license holders by citizenship; valid trade license holders of the citizens of EU.

The statistical data collection and subsequent evaluation has always been enriched by adding more and more item specifications in context with monitoring the integration process. For example, *The Foreigners in the Czech Republic – 2008*<sup>17</sup> will include a new specification – academic qualification required for an employment and the actual level of education attained by foreigners in their country of origin; or, in near future data collection will include the number of foreigners of third country nationals who receive social subvention according to act on social support as well as the number of third country nationals received material allowances in distress by law.

Taking into consideration the CIF as a whole and the priority areas as stated above, in future it will be necessary to include into the *Demographic aspects of foreigners* the household order of foreigners of the third country nationals in the Czech Republic and the household order at their country of origin. Whereas *Information on migration to the Czech Republic* should include the number of houses, either rented or owned by foreigners,

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<sup>16</sup> The Czech Statistical Office carries out a selective survey of labour force as well.

<sup>17</sup> containing the data of 2007 and will be published in the fall of 2008. It is to be noted that data collection and evaluation include as well the citizens of the Member States of the European Union, EEC and EFTA.

expected length of residence and their other plans in future for example. However, the scheduled Census, to be carried out in 2011 according to a special act on census will resolve the stated data deficiencies<sup>18</sup>. *Education, qualification and ability* area does not include yet success of children of immigrants at primary and secondary schools, level of their Czech language skills at school, visiting Czech language courses and other programmes intra integration as well as literacy, language skills, computer know-how etc. Indeed, in 2008 and in subsequent years, attention will be paid in carrying out regular school inspection in order to make out the state of language teaching of students-foreigners of third country nationals for whom the school attendance is obligatory by law. This arrangement will facilitate to get the real situation with language teaching and will even push forward to resolve the identified insufficiencies, both of teachers and of students of third country nationals. The extra gain will be a qualitative view on language skills of foreigners-students of third country nationals<sup>19</sup>. Further, from 1 January 2009, one of the conditions to be required according to act on residence of foreigners, for third country nationals, who strive to obtain permanent residency in the Czech Republic, to demonstrate the Czech language efficiency<sup>20</sup>.

The area *Economical self-sufficiency* will produce more compact outcome when the present statistical data will be enforced with qualitative index. For example, project reports produced intra CIF can be valuable sources to monitor the length of presence and work history in labour market, rate of unemployment and long-term unemployment of foreigners with permanent residency permit, income level of foreigners and share in receiving social allowances, income level of foreigners at household, work condition, readiness/obstruction of employers to employ foreigners, of trade licence holders to monitor the object of trade, length of trading etc.<sup>21</sup>

*Orientation in society* includes one of the priority areas. As in previous area a huge number of projects have been financed<sup>22</sup> intra CIF. In 2008 and in subsequent years monitoring the process how the target group is getting involved into projects intra integration, evaluation of benefits gained from integration programmes, evaluation of own integration by immigrant himself and by other immigrants among themselves, information on what they lacked and/or found difficult to access at the entry period and during the process of incorporation into majority society. This subjective survey will further enrich the present quantity based statistical data.

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<sup>18</sup> The special act on census is formulated in conformity with the instructions and recommendations of ECE, UN, Eurostat and other international organisations and the Regulation (EC) No 862/2007 of the European Parliament and of the Council of 11 July 2007 on Community statistics on migration and international protection and repealing Council Regulation (EEC) No 311/76 on the compilation of statistics on foreign workers.

<sup>19</sup> A combination of quantitative and qualitative indicators are the key point to measure the integration process; moreover, it will particularly be useful for policy improvement.

<sup>20</sup> This provision will allow to get an objective view on number of foreigners who are able to communicate in Czech, i.e., who are integrated through language into society.

<sup>21</sup> Each year intra CIF, Ministry of Labour and Social Affairs finances a huge number of projects through NGOs and projects are, as a rule, set as per the significance of usefulness to target group, i.e., the immigrants of third country nationals. Analysis of preliminary as well as final reports produced and submitted by NGOs can well illuminate us, at least partly, with the real situation. True that a periodical sociological survey is far more good source.

<sup>22</sup> Projects are funded not only by the Ministry of Labour and Social Affairs, also by other relevant Ministries as well as some municipalities and regional offices. Some municipalities and regional authorities have in line with CIF included the integration of immigrant either into their Community Plan on Social Services and/or into Mid-term Plan.

*Relations of Foreigners with Members of majority Society* is another area which like the previous one demands to monitor the negative as well as positive experiences of immigrants in communication with majority society, manifestation of discrimination and racism, responses of majority society and members of other communities on the presence of immigrants, involvement of immigrants into special/hobby organisations, social activities, personal and/or family contacts with majority society and the like. Projects financed by the Ministry of Labour and Social Affairs through NGOs and their project reports can be a source to examine how effectively the projects impact on both of the fields and on both parties: immigrants and members of majority society.

### **Regional Labour Markets:**

Sort out of statistical data and evaluation includes as per the areas, districts and regions. For detail, viz. previous two sections.

In this respect it is worthy to mention that a separate publication *Foreigners in Regions of the Czech Republic*<sup>23</sup> was published in 2006<sup>24</sup> with a plan that the publication will be repeated in 3 to 5 year intervals<sup>25</sup>. The publication includes along with figure of immigrants according to residency status also the share of immigrants in the population of individual regions, share of immigrants with permanent residency permit, share of immigrants with long-term residency permit, economical activities of immigrants. All these data are further evaluated from gender aspects. It as well includes immigrants by most frequent citizenship in regions, purpose of residence<sup>26</sup>, age groups. All these data are henceforth used to show a comparing picture in respect with other regions.

A unique summary version of statistical data, called *Life of Immigrants in the Czech Republic*<sup>27</sup> was published in the fall of 2007. The objective of this pocket publication is to present the basic information about foreigners in the Czech Republic into a simple way to the ordinary people. Hence the information appeared mostly in tables and figures. It renders information on resident foreigners in the Czech Republic, economic activities of foreigners in the Czech Republic, selected statistics of foreigners in the Czech Republic and the top 5 foreign citizens in the Czech Republic. Like the foregoing publication this one will repeat its publication in 3 to 5 year intervals.

### **Sociological Researches-Effort to Identify Qualitative Data:**

In context with immigrants integration under the CIF, the Ministry of Labour and Social Affairs has undertaken to carry out several sociological researches through professional institutes. One of them is *Access of Female and Male Immigrants to Education and Labour Market*<sup>28</sup>, completed in the summer of 2007. The research findings include some striking

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<sup>23</sup> contains third country nationals, citizens of Member States of EU, EEC and EFTA.

<sup>24</sup> This publication is available only in Czech since this is assigned to meet the requirements of individual regions in the Czech Republic.

<sup>25</sup> Assumption is that conspicuous changes in distribution of immigrants in regions are evident in 3 to 5 year period of time.

<sup>26</sup> includes immigrants with permanent residency permits under family reunification, domiciliation etc. immigrants with long-term residency permit for over 90 days, trade licence holders, full fledged students as well as students on training courses.

<sup>27</sup> This unique summary publication is available in Czech only. It too contains third country nationals, citizens of Member States of EU, EEC and EFTA .

<sup>28</sup> The research analysis is available only in Czech at: <http://www.cizinci.cz/clanek.php?lg=1&id=484>



statements, for example, female migrant plays the central role in up keeping the cultural tradition of the country of origin, on the other hand the same person transmits the strategy of integration to second generation; however, though the women migrants not necessarily follow their spouse or parents in migration process but as independent working migrants, they are often subject to low-paid and unpaid works and with very narrow chances and/or opportunity to exercise their qualifications in labour market. Immigrant families feature the “traditional” gender division – men earn more whereas a considerable share of housekeeping fall on women, which does consequently not much pronounced from the structure of Czech families. Other important findings include: the Czech language skills is a key for better and well paid jobs, as well as for further education and integration into the Czech society; on mediation of jobs immigrants in particular turn to another immigrants who are known to them and/or relatives whereas they use minimum the websites of Ministries and service providing NGOs and/or institutions. Economical and work conditions are deciding factors for about 40% of immigrants-participants of the research, whether to permanently settle down in the Czech Republic; only 11% of them are inclined to obtain the citizenship but 24% of them hope that sooner or later they will go home back. The research findings also include that women immigrants earn outstandingly less than their male-immigrant counterparts. Children play the vital role to facilitate the integration of their immigrant parents and immigrant families with children are more inclined to stay permanently in their host country.

The qualitative statement acquired through the analysis of the research work implies substantially a higher quality of data. It is also evident that integration policy, whether in labour market or in any areas, should take into consideration the dissimilar situation of women-immigrants and along with integration of individual immigrant, emphasis should be placed on integration of immigrant families. It is as well apparent that statistical data collection should be accompanied by, periodically carrying out qualitative analysis in order to monitor the integration process.

Another sociological research, called *Effectiveness of Services providing by NGOs to Immigrants intra Immigrants Integration Policy* will be completed in early fall of 2008. The research project is set to acquire information from service providing NGOs on, for example, which services and activities, from their standpoint, adequate and vice versa in facilitating immigrant integration, what services are sought the most by immigrants and whether the existing services and activities are able to meet their demands, the most aching issues and obstacles the NGOs face in providing services to immigrants etc., whereas immigrants as beneficiaries, from their standpoint, will accord information on, for example, in what volume and extent they avail the services of service providing NGOs, their own evaluation of services from the viewpoint of adequacy/inadequacy, their own proposals in service providing etc.

It is expected that the project analysis will enable us to profound our knowledge on immigrant integration in labour market as well in other areas of daily life of immigrants<sup>29</sup>, for example, coexistence, prevention against intolerance and racism etc.

Integration process has always been influenced by a series of agents, and they are of subjective as well as objective nature; this is what makes the process complex. Monitoring a complex process requires a complex monitoring system – a combination of quantitative as well as qualitative indicators.

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The research result will as well include a complex set of information regarding the agents that either are barriers and/or inhibit and/or decelerate the integration process.

Author's note: The Czech legal order differentiates citizens of the country from non-citizens by the noun "Foreigner". It is to be noted that in this article "Foreigner/s" is used only when it concerns official documents and it is used as the synonym to immigrant/s.

## **Statistical Instruments for Optimised Description and a Better Understanding of the Role of Migrants in the Regional Labour Market of the District and City of Recklinghausen (Germany)**

*Jean-Luc Malvache*

In Germany, a strong awareness for the integration problems of migrants (persons without German passports) has been developed at Federal level, at the level of the states and at regional and local level during the past decade. Experts have pointed out that one of the main reasons – and consequences - for the observed integration deficits lies in the difficulties the migrants have in their access to employment. The obvious economic successes of certain segments of the migrant population (for example, migrant entrepreneurs anchored in the regional economy or developing nation-wide or international activities, well-trained young migrants of the third generation establishing themselves in a growing number of branches of the service sector, the large scale presence of well-accepted ethnic food restaurants) should not make forget that a majority of migrants are confronted with quantitative and qualitative problems of access to employment, to good jobs and to jobs enabling them to develop professional careers. Regional and local actors, wanting to develop specific programmes and measures in response to these problems, have frequently found themselves confronted with the fact that their knowledge of the employment situation of migrants was limited to a general frame of information hardly suitable for the design of target group-oriented policies of support based on a careful analysis of the diversity and complexity of the employment structures of the migrants. This state of things led the political and administrative actors in the district of Recklinghausen (Kreis Recklinghausen) and the city of Recklinghausen in the northern section of the Ruhr region in Germany to commission two studies dealing with the employment situation of migrants. Both district and city register persistently high rates of unemployment in general and long-time unemployment particular among the migrant population. In addition, transition phases from school to vocational training and from vocational training to work prove to constitute real obstacles for young migrants seeking to access the job market.

Due to its general approach, the first project entitled "*Beschäftigungsentwicklung, Arbeitslosigkeit und Arbeitsmarktpolitik im Arbeitsamtsbezirk Recklinghausen 1945-2003*" [*Development of employment, unemployment und labour market policies in the Recklinghausen district of the Federal Agency for Employment 1945-2003*], was not primarily centred on the employment situation of migrants. But employment of migrants was considered one of the main elements in the reconstruction of the different phases of the transformation of the labour market in the district, so that the question of the place and role of the migrants in these different phases became a recurrent theme of the study.<sup>(30)</sup> The second project in the form of a pilot study entitled *Pilotstudie "Ethnische Ökonomie in Recklinghausen"* [*Ethnic economy in Recklinghausen*] was, on the contrary, focused on ethnic economy as a specific aspect of the employment of migrants and on migrant entrepreneurs as a specific group of economic actors in the city. As their designs show,

<sup>30</sup>

The results have been presented in: Malvache, Jean-Luc: *Beschäftigungsentwicklung, Arbeitslosigkeit und Arbeitsmarktpolitik im Arbeitsamtsbezirk Recklinghausen 1945 - 2003*, Recklinghausen 2004, 345 pp. In an shorter version: *Beschäftigungsentwicklung, Arbeitslosigkeit und Arbeitsmarktpolitik im Arbeitsamtsbezirk Recklinghausen 1945-2003 - Kurzfassung*,. FIAB-Arbeitspapier Nr. 6, Recklinghausen 2005.

the two projects were quite representative of two different approaches of the problems of migrants employment. The first project was based on a description of long-time transformation of the general labour structures in the district, considering the observed labour market status-quo as the product of these transformations. It developed a deficit-oriented approach emphasising group comparisons (between “Germans” and “non-Germans”) in order to identify the differences in employment structures understood as inequalities in labour market access between the two groups. The second one followed a strong resource-oriented approach, in which the migrants were considered as subjects and actors of the local economic life developing their own strategies of access to the labour market within the formal economy or on the fringe of it. In this sense, the concept of “ethnic economy” had an obviously dynamical dimension. <sup>(31)</sup>

Both projects were confronted with the problems of compiling an appropriate data basis enabling a quantitative and qualitative description and evaluation of migrant employment at the level of the territories of reference. On the one hand, migrants related data had been rather unsystematically published by the specialised institutions; the available data basis was nevertheless very large. Some of the published data had already been very superficially interpreted by regional decision-makers but in fact these analyses could not be used in the context of a scientific approach. On the other hand, researchers have been confronted with strong deficits in the data sets themselves. There was no existent data for several fields of research, in particular for the field dealing with the so-called ethnic economy and the activities of migrant entrepreneurs. This meant that new kind of data had to be generated on the base of a catalogue of indicators specially developed in conformity with the objectives of the project, the data being collected by the project team itself.

The results of these works based on partly new data and optimised analysis instruments were

- the generation of complex / detailed data analyses enabling us to document the general or more specific elements of the status quo situation in the employment / unemployment of migrants and to identify the past and possible future trends in this segment of the labour market;
- the generation of elements for a better understanding of the mechanisms of the economic activities of migrants at regional and local level;
- a better awareness for quantitative and qualitative changes in the regional labour market in general as well as for the difficulties of documenting them.

In the following, the approaches developed in both cases will be presented with special references to the type of results obtained from data generation and analysis and their relevance

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The results of the study have been presented in: Pilotstudie Recklinghausen Ethnische Ökonomie: Unter Mitwirkung von: Brücke Recklinghausen: Hegemann-Lescher, M./ Forschungsinstitut Arbeit Bildung Partizipation e.V.: Jelich, F.-J./ Ruhr-Universität Bochum: Harney, K., Kaynarpinar, G., Sürücü, A., Ullrich, H., Yilmaz, E./ Netzwerk BildungsForschung und Entwicklung: Weischet, E. Recklinghausen 2006/ 2007. The scientific evaluation of these results has been published in: Klaus Harney, Heike Ullrich: Merkmale der wirtschaftlichen Selbstständigkeit von Migranten. - Eine Pilotstudie am Beispiel der Stadt Recklinghausen, FIAB-Arbeitspapier. 8, 2008.

## 1. Optimization of the Analysis of Published Data

The question of the better use of the datasets, regularly published by administrations and institutions at regional or local level and easily available in print or electronic form, was the main concern of the first project. The sources used for the project were a) the labour market figures published in the specialised data banks of the Federal Agency for Employment (*Bundesagentur für Arbeit* - BA) at the federal level, b) the regional employment and unemployment statistical tables compiled and published by the district branch of the BA for their own use, c) the data sets generated by the Statistical Bureau of the Land of North-Rhine-Westphalia (*Amt für Datenverarbeitung und Statistik des Landes Nordrhein-Westfalen*), available in its data bank (*Landesdatenbank*).

### 1.1 Approaches for the Analysis and Interpretation of Labour Market Data on Migrants

The following three types of approaches have been developed to make use of the wide range of available data and to enable their cross-linking:

- *the historical approach*  
Due to the strong historical dimension of the project a first focus was set on the quantitative modifications of the structure of migrants employment / unemployment on the district labour market, using older and newer sets of statistics. The transformations of the structures have been measured by reference to time-sequences of different length, for example, over a decade (1960-1969, 1970-1979 etc.) or over shorter periods (e.g. 1998-2002) corresponding to the time frame of other statistical studies. The comparison indicators (in the form of either absolute figures or of percentage numbers) were a) variations of employment / unemployment level in branches, sub-branches [following the German classification WZ 93 resp. WZ 98 or older systems for data prior to the nineties] sorted by gender and age, and b) variations of the percentage of foreigners in various branches of the economy.
- *the comparative approach*  
Structural differences between the employment of Germans and migrants have been identified on the basis of comparing their respective data (documented statistical groups "*Deutsche*" (Germans) and "*Ausländer*" (Foreigners).<sup>32</sup>) The comparison indicators were similar to those of the historical approach. This approach – even if rather simplistic due to the low level of differentiation in regard to the nationality of the employed persons – had a breakthrough character, because it opened really new insights into the labour structure of the district and into the very different employment profile of the two groups.
- *the spatial approach*  
The objective of this approach was to identify the patterns of distribution of the employed migrants over the different entities of the district. The development of this approach was made necessary by the strong variations of the average percentage of employed migrants in the cities belonging to the district. For reasons of incomplete data, it has not been possible to get a clear view of the daily commuting patterns of migrants between various towns of the district or other towns outside the district. The

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<sup>32</sup>

Here is the category citizen / non citizen in use. Not citizens are migrants however there are also citizens with migration background.

available data allowed only a general analysis of these movements for all employed persons.

For the analyses of the data, these different approaches were linked together in order to get a dynamic image of the structure and evolution of migrants employment in the context of the regional labour market.

## 1.2 Examples of Indicators for a Better Understanding of the Situation of Migrants in the Regional Labour Market

In order to get a better understanding of the situation of migrants in the regional labour market, a series of indicators have been worked out.

### Indicators

*Table 1:* Comparative approach: Regular employed persons (liable to social security schemes) district of work by gender, nationality and age. Reference area: District of Recklinghausen 2002

Gender structure

Age groups	All	u. 20	20-24	25-29	30-39	40-49	50-54	55-59	60-64	65 +
% Wo tot.	44,60	44,70	51,95	48,35	42,75	44,60	44,70	40,20	34,40	35,20
% Wo. Ger.	45,20	44,70	54,35	49,05	43,55	44,85	44,90	40,75	35,00	35,95
%Wo. For.	34,70	45,00	33,20	42,00	30,55	36,95	39,10	25,65	15,15	17,40

Age structure

	All	u. 20	20-24	25-29	30-39	40-49	50-54	55-59	60-64	65 +
<b>All</b>	<b>100</b>	<b>3,40</b>	<b>9,65</b>	<b>9,45</b>	<b>29,35</b>	<b>29,45</b>	<b>6,80</b>	<b>6,00</b>	<b>2,10</b>	<b>0,40</b>
Germans	100	3,35	9,10	9,05	29,20	30,20	10,40	6,10	2,15	0,40
Foreigners	100	4,25	19,15	16,20	32,00	16,75	6,05	4,10	1,15	0,25
<b>Men All</b>	<b>100</b>	<b>3,40</b>	<b>8,40</b>	<b>8,80</b>	<b>30,35</b>	<b>29,45</b>	<b>10,15</b>	<b>6,45</b>	<b>2,50</b>	<b>0,45</b>
Men German	100	3,40	7,60	8,45	30,10	30,40	10,50	6,60	2,55	0,45
Men Foreign	100	3,60	19,60	14,40	34,05	16,20	5,65	4,65	1,50	0,34
<b>Women All</b>	<b>100</b>	<b>3,40</b>	<b>11,25</b>	<b>10,25</b>	<b>28,10</b>	<b>29,45</b>	<b>10,20</b>	<b>5,40</b>	<b>1,60</b>	<b>0,30</b>
Women German	100	3,30	10,90	9,85	28,10	30,00	10,35	5,50	1,70	0,30
Women Foreign	100	5,50	18,30	19,60	28,15	17,85	6,85	3,05	0,50	0,15

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), Kreis Recklinghausen, data series for the year 2002, own compilation and calculation. Data retrieval: 13.06.2003.

### Types of Results

This approach allowed a threefold perspective on the structure of the district labour market combining the indicators gender, nationality and age. The advantage of this approach was that it reflected the employment patterns of the migrants as well as the Germans. The given regional example (Table 1) points up that, although the district labour structure shows a dominance by men (more than 55% of the employed persons are men), women - especially Germans - constitute the majority of the employed persons under 25 with a share rising up to 52% of this group. On the other hand, the men-orientation of labour structure is much stronger among the foreigners. Only 35% of foreign employed persons are women. The structural differences between Germans and foreigners are even stronger among the groups of older employed persons: more than 35% of Germans older than 60 are women, compared with less than 16% for foreigners.

Table 2 gives a more detailed view of age structures within the different segments of the labour market. Foreign employees are much younger than German employees. Nearly 60% of Germans are between 30 and 49 but only 49% of the foreigners are in the same age group. 48% of foreign employees are between 25 and 39 years old, compared with only 39% for Germans. Similar observations can be made by comparing the age structure of various gender / nationality groups.

*Table 2: Comparative approach: Structure of employed migrant persons by gender in branches and sub-branches (in percent)*

*Column 1: % of foreigners among all employed persons - Column 2: % of foreigners among all employed male persons - Column 3: % of foreigners among all employed female persons - Column 4: % of respective branch among total employment. - Column 5: % of respective branch among all employed German persons - Column 6: % of respective branch among all employed foreign persons*

*Column 7: % of respective branch among all employed male foreign persons - Column 8: % of respective branch among all employed female foreign persons*

<b>Kreis Recklinghausen (selection of branches)</b>	<b>1 % For in all</b>	<b>2 % For in M</b>	<b>3 % For in W</b>	<b>4 All in %</b>	<b>5 Ger in %</b>	<b>6 For in %</b>	<b>7 % For M</b>	<b>8 % For W</b>
<b>Transformation industry</b>	<b>6,60</b>	<b>6,55</b>	<b>6,85</b>	<b>20,60</b>	<b>20,40</b>	<b>23,80</b>	<b>27,70</b>	<b>16,50</b>
Chemical industry	5,05	5,20	4,45	4,25	4,30	3,75	4,80	1,75
Food and semi-luxury products industry	13,25	12,95	13,60	3,20	2,90	7,35	6,10	9,75
<b>Services (other than commerce, horeca and transport)</b>	<b>4,30</b>	<b>4,85</b>	<b>3,75</b>	<b>21,35</b>	<b>21,60</b>	<b>16,05</b>	<b>14,40</b>	<b>19,25</b>
enterprise-oriented services	6,05	6,40	5,55	12,10	12,05	12,85	12,36	13,75
<b>Public and private services</b>	<b>4,35</b>	<b>5,55</b>	<b>3,97</b>	<b>23,20</b>	<b>23,55</b>	<b>17,65</b>	<b>8,10</b>	<b>35,66</b>
Health and social services	3,85	4,75	3,65	15,40	15,70	10,40	3,78	22,90
<b>All branches</b>	<b>5,70</b>	<b>6,70</b>	<b>4,45</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), Kreis Recklinghausen, data series for the year 2002, own compilation and calculation. Data retrieval: 13.06.2003.

### *Types of Results*

These combinations of data give a good overview of the patterns of migrant employment in some selected branches of the reference region.

- *Col. 1 to 3* show the rates of employed foreigners rather homogeneous between the genders. More than 13% of foreigners worked in the sector of food industry but less than 4% in the sector of health and social services. There is no significant difference between men and women.
- *Col. 4 to 5* reveal significant differences in the employment structure of Germans and foreigners: For example, due to the strong presence of foreigners in the food industry, more than 7% of all employed foreign persons work in this branch, whereas less than 3% of Germans do.
- *Col. 7 and 8*: The comparison shows significant differences in the employment structure between the genders. Nearly 28% of the employed foreign men work in the transformation industry, compared with only 16% of the foreign women. More than 36% of the foreign women work in public and private services, whereas only 8% of the men do.

**Table 3:** Comparative approach: Regular employees (liable to social security schemes) at district of work by occupational classes, gender and nationality

Ger: Germans - For: Foreigners - Wo: Women - % For: Percentage of foreigners - % For. M.: Percentage of foreigners among male employees - % For. Wo.: Percentage of foreigners among female employees.

	All	Ger	For	Men	Ger	For	Wo	Ger	For	% For	% For. M.	% For Wo.
<b>Agriculture</b>	<b>2,00</b>	1,95	2,45	<b>2.70</b>	2,65	3,40	<b>1,10</b>	1,10	0,75	7,10	8.40	3,05
<b>Mining</b>	<b>2,00</b>	1,85	4,60	<b>3,65</b>	3,400	7,05	<b>0,00</b>	0,00	0,00	13,00	13,00	0,00
<b>Manufacturing</b>	<b>27,45</b>	26,50	43,45	<b>43,75</b>	42,90	55,00	<b>7,25</b>	6,60	21,75	9,05	8,45	13,25
<b>Technical</b>	<b>7,05</b>	7,35	1,95	<b>10,95</b>	11,55	2,50	<b>2,25</b>	2,30	0,90	1,60	1,55	1.80
<b>Service</b>	<b>60,60</b>	61.50	45,90	<b>37,80</b>	38,35	30,10	<b>88,90</b>	89.50	75.75	4,35	5,35	3,80
<b>Other</b>	<b>0,85</b>	0,85	1,60	<b>1,15</b>	1,10	2,00	<b>0,50</b>	0,50	0,85	10,55	11.50	7,60

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), Kreis Recklinghausen, data series for the year 2002, own compilation and calculation. Data retrieval: 13.06.2003.

### Types of Results

Structural differences between Germans and foreigners can be identified not only at the level of branches or sub-branches but at the level of professions as well. Whereas branch-related figures give information about the diverging patterns of distribution of the employment of Germans and migrants in the different sectors of economy, data on professions - especially when presented in detail - give a complex overview about the specificities and problems of migrant employment from the perspective of qualification and vocational training. Profession-related datasets are different from branch-oriented sets. Employees having the same profession can be met in enterprises belonging to different sectors. In the context of the the Recklinghausen area, our reference example, statistics show that the share of foreign employees with industrial (manufacturing) professions is significantly higher than that of Germans (43% / 26%) – and that there is a clear gender dimension: nearly 55% of male migrant employees have industrial professions; the percentage of women with this type of professions is three times higher than that in the German group. With 7%, the percentage of migrant workers in classical mining professions is more than twice higher than of the Germans.

**Table 4:** Time sequence comparison: Regular employees (liable to social security schemes) at district of work by gender and nationality

Ger: Germans - For: Foreigners - W: Women – M: Men

	All	All Ger	All For	All M	Ger M.	For M	All W	Ger W	For W.
<b>1998</b>	159.836	148.325	11.511	96.193	87.678	8.515	63.643	60.647	2.996
<b>2002</b>	148.295	139.831	8.464	95.122	75.874	5.528	63.643	60.647	2.936
<b>98-02</b>	<b>-11.541</b>	<b>-8.494</b>	<b>-3.047</b>	<b>-1.071</b>	<b>-11.804</b>	<b>-2.987</b>	<b>+2.530</b>	<b>+ 2.560</b>	<b>-60</b>

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), Kreis Recklinghausen, data series for the year 2002, own compilation and calculation. Data retrieval: 13.06.2003.



### Types of Results

General loss of jobs with the period of comparison affects mainly men [in this region due to the closing of several large mines during the five years of the reference period]. Women employment in regular jobs has expanded. The comparison between Germans and foreigners shows that the latter can be considered as the losers of regional restructuring in this period. More than one-fourth of the “foreigner-jobs” have been lost. The figure becomes more than one-third if men alone are taken in consideration. The number of employed female foreigners remained nearly constant, but this group did not benefit at all from the general expansion of female employment

*Table 5:* Time sequence comparison: Profiles of wins and losses of jobs at district level among female Germans and employed foreign persons between 1998 and 2002 (in absolute figures and %)

Ger: Germans - For: Foreigners

Branches (selection)	1998 GER	2002 GER	1998 FOR	2002 FOR	98-02 GER	98-02 FOR	98-02 GER %	98-02 FOR %
Transformation industry	6.688	6.613	681	485	-75	-196	-1,12	-28,78
Food and semi-luxury products industry	1.864	1.820	362	286	-44	-76	-2,36	-20,99
Chemical industry	1.135	1.121	79	52	-14	-27	-1,23	-34,18
enterprise-oriented services	4.583	6.875	164	404	+2.292	+240	+50,01	+146,34
Health and social services	16.840	17.795	716	672	+955	-44	+5,67	-6.15
<b>Overall</b>	<b>60.647</b>	<b>63.237</b>	<b>2.996</b>	<b>2.936</b>	<b>+2.590</b>	<b>-60</b>	<b>+4.27</b>	<b>+2,00</b>

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), Kreis Recklinghausen, data series for the years 1998 and 2002, own compilation and calculation. Data retrieval: 13.06.2003.

### Types of Results:

This table shows structural differences between the losses and wins in the respective branches. These differences are significant. For example, during the reference period, nearly 35% of migrant jobs have been lost in the chemical industry, for example, but only 1% of German jobs.

*Table 6:* Spatial approach: gender structure of employment of foreign persons as part of the general gender structure of employment in local entities (cities belonging to the district of Recklinghausen)

Cities (selection)	% of men in all employed persons	% of women in all employed persons	% foreign men in all employed men.	% of foreign women in all employed women	% of foreign men in all employed foreign persons	% of women in all employed foreign persons
Datteln	48,00	52,00	6,35	4,85	54,90	45,10
Dorsten	54,45	45,55	5,10	2,50	70,85	29,15
Marl	66,75	33,25	6,15	3,85	76,25	23,75
RE	49,25	50,75	6,65	4,30	59,90	40,10
<b>District RE</b>	<b>55,40</b>	<b>44,60</b>	<b>6,75</b>	<b>4,45</b>	<b>65,30</b>	<b>34,70</b>

Source: Statistical Office of Northrhine-Westphalia (LDS NRW), District Recklinghausen and related cities: Data series for the year 2002, own compilation and calculation. Data retrieval:

### *Types of Results*

The spatial approach show significant differences among the cities: men-oriented employment structure (Marl) vs. women-oriented structure (Datteln). Among the employed foreign persons, the same differences can be observed. But in general, the employment of foreign persons is more strongly men-oriented, like for example, in Marl.

## **2. Generation of New Specific Migrants Related Employment Data**

The main issue of the second project was the generation of new quantitative and qualitative information on the role of migrants in regional labour markets that a) is not available by (optimised) analysis of available data sets, b) is necessary to understand specific aspects of the role of migrants in regional labour contexts.

The study of migrants as actors in local economic development concentrated on the migrant entrepreneurs at the level of the city of Recklinghausen. Because it was not possible for the researchers to work on already existing data, they had to generate their own data. This task made a rather complex preparation process necessary; the quantity and quality of the collected data was very much dependent on the degree of readiness of the migrants to cooperate. The first step of this process was the design and the sending of a questionnaire explaining the reasons why the institutions and organisations participating in the project were developing such an initiative and what were its aims. The second step was the generation of a data basis with addresses of several hundreds of foreign entrepreneurs or entrepreneurs with a immigration background (of German nationality). This resulted from a compilation of information supplied by the Chamber of commerce, the Chamber of handicrafts and by entrepreneurial associations. The compilation of this type of data was something new in the region and the gathering of the information turned out to be more difficult as we originally thought. The third step of the process consisted in analysing the completed questionnaires, sent back by the entrepreneurs, on the basis of data cross-linkages. The return rate of 20% allowed statistically significant results.

The structure of the collected data was so organised that it enabled us not only to draw a quantitative survey of migrant entrepreneurship in the city of Recklinghausen, but to compile the necessary statistical elements for an evaluation of the activities of both the regional and local, public and private institutions like the Chamber of commerce, the Chamber of hand-crafts, the municipal services for economic development, banks or some migrant organisations specialised on the promotion of economic activities and actors. The data collection was organised around four thematic focuses:

- Personal data for identification of the demographic structure of the entrepreneurs in the city in terms of gender, age, nationality (German, others), level of qualification (general and professional) etc. A special focus was on Turkish migrants which is the largest group of foreigners by nationality and has a complex generational structure (first, second and third generation).
- Data concerning the foundation of the enterprises such as: year of foundation, reasons for the foundation, branch of activities etc. The range of possible answers reflected a wide scope of contexts: career issues (better advancement possibilities or better wages), individual professional project (wish to become independent, realisation of a specific idea, social prestige as entrepreneur), earning and standards of living (self-employment as an alternative to unemployment).
- Data on the economic development of the enterprises such as yearly turnover, the number and status of employees, or the readiness to engage in vocational training of

apprentices. The question of the status of the employees is of special relevance in the context of ethnic economy. The habit, for example, of frequently calling on family members – mostly unpaid – or part-time helps - frequently recruited among friends - to work in shops hark back to practices linked to the informal economy. Research in this field shows that ethnic economy stands at the threshold between formal and informal economy and works as an interface between the two. Due to the key role of vocational training in enterprises in the German system, the question about the readiness of migrant entrepreneurs to train apprentices was considered an important issue in order to evaluate how these entrepreneurs saw themselves as actors in the German labour system.

- Data on the types of problems met in the phase of enterprise creation and afterwards and data on the types of guidance and assistance addressing these problems: a) types of problems met between the beginning of the entrepreneurial activities and the time of data gathering – b) origin of the starting capital – c) types of advising and assistance services used prior to the foundation of enterprise or during the starting phase of the activities – d) degree of satisfaction with these services. The problems could be of more individual type, such as insufficient fluency in German, insufficient knowledge of computer applications or of accounting and taxation systems etc., or of more institutional or societal character, such as problems having to do with administrations and official services, with house owners or neighbours, etc, or of more economic origin, such as insufficient knowledge of branch activities, difficulties of getting the necessary financial funds, the constitution of a clientele, finding adequate employees, etc. This field of data was of immediate interest for the public or private institutions mentioned above. It enabled them to have feedbacks about their own activities, to evaluate their impact on the specific target group of migrant entrepreneurs and to gain a better understanding of its specific needs with regard to commercial and legal information and initiatives related to business training and support.

The core of data analyse was based on their cross linking and their projection on a time grid with the year 2000 as reference year. It appeared for example that there were strong links between the year of foundation of the enterprise and the nationality of migrant entrepreneurs or entrepreneurs with immigration background. More than 65% of migrant entrepreneurs who founded an enterprise after 2000 did not have German nationality; before 2000, 54% of the same group were migrants with German nationality. One of the reasons for this was to be found in the context of the business foundation. Whereas enterprise foundations before 2000 were mainly the result of professional projects of migrants "having already settled down" in the German society and desirous to follow their own business ideas, enterprise foundations after 2000 were often seen as an alternative to unemployment; in this case the actors were migrants – more recently immigrated or belonging to the second or third generation but still retaining their nationality of origin - who had much greater difficulty "settling down" in German society. As the interpretation of results has shown, these different contexts of enterprise foundation had strong influences on the level of qualification and degree of preparation of the respective groups of entrepreneurs, on the types of problems they met with at the beginning of their entrepreneurial activities, as well as on the strategies they developed to cope with these problems. In general, the different profiles of problems cumulated in the starting phase of an enterprise can be seen as good indicators of the different contexts of enterprise foundation. At the same time, the decrease or the persistence of cumulated problems after the starting phase give valuable information on the stability or instability of these enterprises.

Beside the generation of descriptive information on the migrant entrepreneurship in Recklinghausen, its field of activities, its actors and their expectations, the ethnic economy approach developed in the study rendered possible a first evaluation of the position of the enterprises with regard to their relation to formal or informal economy. The authors of the study have identified two types of enterprises – the formally structured and the informally structured enterprises. Enterprises of the first group are based and run according to the general principles of the management of financial, human, information and knowledge resources. Specialised institutions are considered as partners; emerging problems are discussed with them and solved with their assistance. Generally, formally structured enterprises employ more persons and generate higher turnovers and more income than informally structured enterprises. Enterprises of this second group are generally very small enterprises employing less than five persons. They have frequently been created in order to avoid unemployment. In contrast to the first group, in which many of the entrepreneurs have distanced themselves from the ethnic milieu, informally structured enterprises still rely strongly on ethnic networks (mostly with people of Turkish nationality or of Turkish origin), where they find the necessary assistance in case of financial and other problems and where they can recruit help or temporary staffs among relatives, friends and other groups. Therefore, public or private institutional actors do not play an important role in the foundation and development of these enterprises.

### **3. General Remarks as a Conclusion**

- a) Both studies have – directly or indirectly - shown that the quantity and quality of migrant employment and unemployment in regional labour markets as well as the type and range of the structural changes in this area are strongly connected to the economic and employment structures of the regions themselves. In the so called "old industrial regions" especially, the long-term economical structural patterns, the successive transformation waves of these patterns, the dominant types of enterprises, as well as the entrepreneurial culture have had direct influence on the quantity and quality of jobs migrants had access to. For the migrants, the conditions of access to work varied considerably from generation to generation. The restructuring of industrial branches, which often led to the end of workforce-intensive activities, was followed by considerable losses of jobs held by migrants. The rise of the large and heterogeneous service sector was accompanied by new types of employment forms as a consequence of the deregulation of the existing labour force legislation. In this case too, statistics have shown that the migrants were in very vulnerable positions on the job market. Moreover, low levels of qualification of migrants appear very often as obstacles to their mobility between the regions and between the branches. Although the regional development strategies and policies aiming at the settlement of new activities generally relying on the high education segments have had positive impacts locally, they offered only very few opportunities for the migrants to have access to better jobs, which would have meant a social promotion for them.
- b) In the future, one of the main issues for regional and local decision-makers in the field of employment promotion will be to develop programmes and measures to encourage the inclusion of migrants in regional and local economies:
  - 1) by developing a sensitivity to structural transitions, in which migrants often stay on the losers' side, in order to avoid their confinement in specific segments of the job markets.

- 2) by continuing their efforts in the optimisation of the disposition of transitions within the educational system especially a) to avoid drop-outs and the concentration of migrant pupils in the lower segments of this system and b) to give these pupils the possibility to acquire the necessary training and qualifications that will facilitate their transition to career life - in particular through the mastery of technological change - and to extend their opportunities for employment. In the same context, regional and local decision-makers should develop sustainable efforts to open new paths of transition to career professional in order to avoid economic and social disintegration. <sup>(33)</sup>
  - 3) with regard to the ethnic economy, special attention should be given to the formalisation of entrepreneurial practice. There are still great needs for advice and assistance if migrant entrepreneurs are to acquire the necessary tools to be able to create and run their enterprises according to the general principles of the management of financial, human, information and knowledge resources. This belongs to the field of the optimisation of the transition to career life too. The Recklinghausen study on ethnic entrepreneurship has pointed out the possible dangers of compensatory entrepreneurship as an alternative to unemployment. This option might appear as an acceptable immediate solution, but a closer look shows that it is very unstable and without real future perspectives, and that it has the risk of establishing a new segment of economic disintegration and exclusion strongly linked to ethnicity.
- c) In this context, the main issue for the successful further development of regional labour market monitoring should be the question of continuity and sustainability of monitoring. Continuity is here more than a key, it is a pre-condition for further success – especially in dealing with target group oriented monitoring. As the Recklinghausen projects have shown, the problems linked to labour access of migrants are, on the one hand, the long-time consequences of “heritage and errors of the past”, but they are at the same time results of the dysfunctioning of still active policies and programmes. It will therefore take time to reform these or launch new ones, so that further monitoring will be necessary to evaluate the impacts of these reforms.

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The specific problems of young migrants regarding the transition to working life have been treated in several projects run by several institutions in the city of Gelsenkirchen, which belongs with the district of Recklinghausen to the region of Emscher-Lippe. The results have been published in a series of studies, for example: Jugendliche Migrantinnen und Migranten in der Region Emscher-Lippe. Probleme und Chancen beim Übergang Schule – Beruf. Eine Situationsanalyse, Berufsbildungswerk des DGB, Gelsenkirchen: Arbeitspapier des BQN Emscher-Lippe Nr. 1, Gelsenkirchen 2003.

## Forecasting Skills and Labour Market Needs in Luxembourg: a Particular Transnational Context

*Franz Clément*

Forecasting skills and labour market needs seem to be difficult in Luxembourg, because of the particular economic and geographic situation of the country. First I will briefly present the situation of Luxembourg focussing the economy and the labour market. In a second step, I will try to see how the anticipation of training and the needs of the enterprises are organised in Luxembourg. And finally, as a third point, I will deal with more general observations concerning the topic.

### The Situation in Luxembourg

The situation of Luxembourg is peculiar in Europe. The country's labour market is not limited by national borders but spreads out into regions of neighbouring countries. The geographic and economic situation of the country explains this phenomenon, as we will see. Since 1975, the labour force has increased by 160.000 wage earners. More than 110.000 of these are cross-border workers. That means they have held more than twice as many jobs as residents of Luxembourg. A majority of these cross-border workers are non-nationals. In the context of the important economic growth from 1995 to 2000 (with average growth of GDP (Gross Domestic Product) exceeding 6,0%), the labour market in Luxembourg has determined by an extraordinary dynamism. The economically sluggish times noted beginning from early 2001 has, with a certain delay, given rise to a slowdown of the creation of paid jobs, a slowdown that took place in 2002 and went on in 2003. 2004 was the year of the economic revival.

According to the information of the Central Service for Statistics and Economic Studies<sup>34</sup> (STATEC), the situation in 2007 can be described as follows:

*Table 1: Luxembourg in the year 2007*

Year 2007		
Total amount of salaried jobs	316.460	
	Inhabitants of Luxembourg	Cross-border workers
	180.227	136.233
Countries of the cross-border workers	Germany	32.228
	Belgium	35.348
	France	68.657

Source: STATEC 2007

We can see that 43,0% of the wage earners in Luxembourg are cross-border workers. They come from France (50,4%), Belgium (26,0%), and Germany (23,6%).

<sup>34</sup>

Now, let us have a look at the representation of these cross-border workers in the most important sectors of activities in Luxembourg on March 31<sup>st</sup>, 2007 (in %).

Table 2: Cross-border-workers in Luxembourg on March 31<sup>st</sup>, 2007 in percent

Economical sectors	Inhabitants of Luxembourg	Cross-border workers				Amount of wage earners
		France	Belgium	Germany	Amount	
Agriculture, hunting, forestry	72,6	8,3	10,8	8,3	27,4	100
Extractive industry	55,0	27,6	3,7	13,7	45,0	100
Manufacturing industry	42,4	31,2	12,8	13,6	57,6	100
Production and distribution of electricity and gas	92,1	3,4	1,2	3,3	7,9	100
Construction	51,5	20,4	11,8	16,3	48,5	100
Trade	50,2	26,0	14,3	9,5	49,8	100
Hotels and restaurants	65,2	26,5	5,5	2,8	34,8	100
Transports and communications	54,3	17,4	11,9	16,4	45,7	100
Financial sector	50,3	21,1	15,9	12,7	49,7	100
Estate and services to enterprises	42,2	35,4	15,4	7,0	57,8	100
Civil administration	97,1	1,0	0,7	1,2	2,9	100
Teaching	73,8	11,7	6,5	8,0	26,2	100
Health	68,8	14,0	7,2	10,0	31,2	100
Social and personal services	67,4	19,6	7,0	6,0	32,6	100
Household duties	89,0	6,4	1,8	2,8	11,0	100
Jobs abroad	71,6	20,2	6,0	2,2	28,4	100
Undetermined	51,9	19,0	10,9	18,2	48,1	100

Source: IGSS 2007

We can see that cross-border workers are predominant in two very important sectors:

- Estate and service to enterprises with 57,8%;
- Manufacturing industry with 57,6%.

In three other sectors the proportions between inhabitants of Luxembourg and cross-border workers are approximately at the same level:

- Construction: 48,5% for the cross-border workers;
- Trade: 49,8% for the same workers;
- Financial sector: 49,7% for the same workers.

We imagine that this situation will not change in the future because employment remains strong. Even though the growth rate for paid employment is higher than 3% annually, it is below the rate experienced during the 1998-2001 period (+5,5% on average per year), when unemployment fell. But, the labour market, that reacts slowly to economic trends, remains in good shape: a year-on-year rise in salaried employment of almost 5% was recorded for the end of 2007 and unemployment continues to fall<sup>35</sup>.

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More than 13.000 jobs were created in 2007, with 70% being filled by cross-border workers. As is the trend across Europe, the B2B (Business to business) and financial sectors were most dynamic in creating jobs, followed by construction.

At the start of 2008, the unemployment rate was 4,2%, compared to 4,5% the year before. Following drops in jobseekers receiving full unemployment benefit, then drops in those involved in job schemes, the number of jobseekers registered at the public employment service ADEM<sup>36</sup> finally began to decrease. In almost every sector, the number of jobseekers per job offer has fallen in 2007, a symptom of growing tensions, especially in the financial sector.

The increase in employment peaked in 2007, with a delay of one year compared to the peak reached by the expansion of economic activity. It will continue to weaken in 2008, and is expected to reach a 3% increase in 2010, slightly less than the long-term average.

Two major reasons can explain this particular phenomenon in Europe<sup>37</sup>. The first reason is the high unemployment rate in the regions bordering Luxembourg. In 2006, there were 590.657 jobseekers in the area named "Great Region" excepting Luxembourg (The Lorraine in France, the Saar and Rheinland-Palatinate in Germany and finally Walloony in Belgium). The unemployment rate at that point in time was as follows: 10,0 % in the Lorraine; 9,5 % in the Saar and 8,0 % in Rheinland-Palatinate; 11,7 % in Walloony.

The second reason is that certain specific qualifications wanted by the enterprises of Luxembourg are lacking in the country, making recourse to an exterior qualified labour unavoidable.

We already foresee the difficulty of improving the national educational system aimed at equipping the inhabitants of the country with several recently required qualifications. Let us also be reminded that the complex problem of lifelong learning is one of the most essential points in Luxembourg, it has to be improved, according to European advice.

### ***Some Policy Implementations***

The policies of Luxembourg, intended to make the needs of the enterprises fit with the possibilities and training offers, have many faces. A number of partners intervene in a particular geographic context. The indications given here are only an idea about the way Luxembourg deals with the problem of matching training to the demands of the enterprises.

#### **At the National Level**

The initiatives targeting professional and educational orientation are found on different levels. The first one concerns public services.

#### ***The Role of the Public Employment Service ADEM***

We first note the action of the Professional Orientation Service (OP) of the ADEM, which is aimed at young people who have to choose a training option in accordance with their academic capacities and their personal interests. The efforts on professional orientation do not exclusively appeal to young people, but also to their parents and all those who are or

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<sup>36</sup> Administration de l'emploi.

<sup>37</sup> Statistiques en bref 2008, Offices statistiques de la grande Région, Janvier 2008.



were already active on the labour market and who wish to reorient themselves professionally. The OP's mission is to help them with that difficult task and this help takes shape when they pay a visit to a career information centre (BIZ – Berufsinformationszentrum) where the involved persons are informed about the many professions and jobs, existing in the enterprises, and about the available trainings. We shall also mention the educational orientation shaped at school. The Services of Psychology and Educational Orientation (SPOS) are, next to teachers, also active in that matter both in the traditional and in technical secondary schools.

### ***The Survey “Qualifications of Tomorrow”***

Moreover, we must mention services offered on professional orientation by non-public organisations, including the professional chambers and employers and organisations of wage earners that accompany and complete the efforts made at other levels. Other important tools in this matter are records edited in a collaborative work by the Federation of Luxembourg industrials (FEDIL), the Chamber of Commerce, the Chamber of Labour, and the Department of Education and Professional Training, showing the way to training in industry and describing certain attractive professions.

At the national level, let us also mention the realisation of a survey in the course of 11 years about the “qualifications of tomorrow” in the industry and in communication technologies. This survey creates a partnership among the main employers' organisations of Luxembourg as well as the public services for employment of the country.

The survey involves the dispatching of questionnaires to the enterprises affiliated with Employers' organisations targeted by the survey. Phone contact was added to the survey methods.

The enterprise survey in Luxembourg is rather simple. It consists of a questionnaire named «Qualifications of tomorrow», composed each year since 1997.

This questionnaire is sent to all enterprise members of the FEDIL, the national federation for industrial companies. FEDIL is a very important organisation. It covers more than 50% of the workforce of the country. The goals of the survey are the identification of labour shortages and training needs in the industrial technological enterprises.

In this questionnaire, each enterprise is asked two major questions:

1. Do you want to hire people in the next 2 or 3 years? If yes, which qualifications or skills do you need?
2. Do you want to replace employees in the next 2 or 3 years? If yes, which qualifications or skills do you need?

The response rate has been slightly more than 50%. Directors of human resources departments have been giving responses.

The questionnaire is sent via mail and sometimes the persons in charge of the survey make phone calls to encourage the firms to answer. The survey is funded by the national Ministry of Education, European funds (Eures, Leonardo), the FEDIL and other employers.

Feedbacks are given to the enterprises through the publication of brochures with the results of the survey.

An enterprise survey is very important because, in Luxembourg, during the last 5 years, the unemployment rate has been around 4,7% and 4,9%. During the last 4 years it was impossible to reduce this rate. One explanation points to the fact that inhabitants of the

country suffer from problems of professional qualification and lifelong learning. For example, in November 2006, 75% of the young people registered in the ADEM under 26 had no diploma!

Nevertheless, the surveys on the “qualifications of tomorrow” have led to different policy implementations. Here are some of them. Concerning the need for manufacturing agents, 12 training series meant for jobseekers have been organised by public authorities, employers’ organisations, and some private enterprises. There have also been some complementary training programmes for security agents for protection of buildings. Continuous professional training measures have been taken in the building sector.

Specialised training programmes in data processing have been created in schools. The University of Luxembourg has also organised specific courses with adapted diplomas in the technical field.

Essentially we can say that the policy of Luxembourg places itself in an international context and is regulated by different public and private actors within partnerships to make the needs of the enterprises match the possibilities and training options. Nevertheless, it is necessary to add that there is no evaluation of the efficacy of the new trainings created.

### **At the Cross-Border Level**

As indicated, Luxembourg does not form a national labour market, but a cross-regional one. Of course this established fact complicates a policy of national training aimed at fulfilling the needs of enterprises that are known in Luxembourg which accepts a great deal of employees from other countries. Nevertheless, solutions and cooperation schemes have made it possible to reduce the intensity of this problem. As part of these transnational exchanges of information and advice between member states of the European Union, a cooperation programme has been established between the OP and the Service for Professional Orientation (Berufsberatung) of Trier, in Germany.

In fact, a career adviser goes to Trier once a month and is for the whole day available to provide young people and adults with information about the possibilities of training and employment in Luxembourg. The German contribution to this exchange consists of an orientation adviser who is present twice a month at the ADEM in Luxembourg. Since 2004 the service of the OP continued to take part in information and orientation meetings of a group concerned with professional integration. The group is mainly composed of professional chambers, associations, and the Public Service for Employment from both France and Belgium. Meetings of the group aim to reinforce the professional orientation and the training of young people in an international context.

We must also mention the recent completion, as part of the European programme EURES (European Employment Services), of a survey conducted in Luxembourg as well as in the bordering regions of Belgium and France, on the theme “jobs of tomorrow”.

This survey has been conducted by the employers’ associations of Luxembourg (FEDIL), of Belgium (CCILB), and of France (MEDEF), among their members, for the purpose of determining their needs, questioning them about their employment planning in a two year future period. The survey has revealed 1.655 jobs planned in the space covered by the survey by the manufacturing industry, the building industry, the financial services, as well as the commerce and service sectors for enterprises.

## Other Elements

Actually, there are many differences in the space named “Great Region”: the economic trends are not the same, the demographic trends are very different, and the educational systems are also different. There is a lot of work to be done to build convergences in this area. There is a kind of political level for the Great Region: for years a consultative parliament has been constituted. This parliament is not elected but composed of some representatives of all the parts of the Great Region. This parliament has no real political role, but only a consultative one. It’s certainly another difficulty to build real political cooperation in this area. A common framework for all European countries could help Luxembourg and its neighbouring regions to anticipate skills and needs of enterprises better. But such a framework would not remove the particularities of each country.

Happily, a new research programme funded by the European Commission in the framework of the “Interreg initiatives”, will bring all the parts of the Great Region together. This new programme will analyse all the flows and the needs of the enterprises in this area, because some problems are surfacing now. For example, it seems difficult for temporary work agencies to find in the Lorraine area all the qualifications they need, because many people of the Lorraine area went to work to Luxembourg. From this example, we can see that the situation we described before may have consequences not only in Luxembourg, but also in the other parts of the Great Region. The new program will:

- Analyse the surveys concerning the skills needs in all the parts of the Great Region;
- Try to build a common framework for the questionnaires concerning the anticipation of the skills needed in this area in the future;
- Make the comparison possible between all the parts of the Great Region;
- Build a common framework to analyse the needs of enterprises and the skills they want in all this geographic space.

It is necessary, too, to insist firmly on the balancing of economic growth, productivity, education, research, and development. This point of view is particularly favorable in Luxembourg. It is an idea that, if applied in Luxembourg, best allows the employment developments to coincide with the training ones.

A more outstanding education system in Luxembourg will cost about 1.200 millions of Euros yearly. The costs of the University of Luxembourg will come to 200 millions of Euros in the next few years; the research and innovation will need an extra of 500 millions of Euros for the years 2007 to 2009. The government is planning on doubling the 2006 budget for research. It should reach 0,66 % of the GDP in 2009.

For this purpose the country created an “observatory for competitiveness” in 2004. The role of this observatory is to help the government and the unions to define the orientations and the substance of favourable policies that are compatible with long-term competitiveness, source of growth, and social welfare. In fact, one direction is in developing superior education and research, a field in which Luxembourg has significant deficit.

Of course, Luxembourg has only had a university in the strict sense for 5 years.

Now, in a knowledge society, it will be difficult for a country to remain twice as rich as the average of its neighbours without learning on a superior education basis. The policy for research and development will also have to allow Luxembourg to strengthen the

cooperation between the private and public sectors. After an important recent restructuring, a change is taking shape: an enterprise having laid off several workers has just signed an agreement with the research world in order to generate new products leading to new industrial jobs within a few years. In the same way Luxembourg is proceeding to drain ancient industrial grounds in order to simultaneously set up the university, a science city and enterprises. This shared site should create links between research world and enterprise world in such a way that it could generate several thousands of jobs in the future.

Finally, it is necessary to mention that Luxembourg is now building a totally new observatory of professional training. The content of the missions of this new institution are not defined yet. However, it can perhaps make progress in the future concerning the anticipation of skills needs.

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## Labour Market Monitoring in Border Regions

*Ágnes Hárs / Katalin Nagy*

Recent enlargement of the EU has led to a substantial change of the regional heterogeneity and geographical pattern of the EU. It has been supposed that EU enlargement will have relevant impacts on the location and relocation of economic activities, and especially border regions will play a special role within spatial dynamics generated as a result of enlargement. European enlargement and integration of regions open a new area in the economic and social development in Europe. Causes and consequences of uneven development at the level of regions show a great variety. Focusing on the New Member States of the EU, besides differences there are similarities as well. Regions may not only cooperate with each other but they may compete with each other as well (for attracting FDI, labour, etc.), a phenomenon that can be observed in case of regions but intra regionally as well. In this respect the case of border regions is even more interesting since they have often achieved quite different stage of economic development on the one hand, but show a lot of common features, similarities on the other. The deepening of European integration and especially the enlargement generated substantial changes across regions. Thus a special attention should be given to the labour markets and labour migration of the border regions. Economic or wage drive of migration based in fact on Barro & Sala-i-Martin modell (1991, 1995) supposing that considerable wage difference without institutional margins indicate a given size of migration. Compared the influx of capital migration has a less strong effect on regional disparities (Rappaport 2000), border regions follow different patterns, the role of labour migration, e.g. a commuting type migration has different role. Research in this field has been limited and restricted to cross border research.

In several case studies we analysed the specialities of the Hungarian-Slovak labour market trends in bordering regions (Nagy [2006], Hárs [2006]). There is empirical evidence both in case of Hungary and Slovakia that there are some special facts which are of outstanding importance from the point of regional development. These are: a) the presence of FDI, b) the closeness and the availability of either the capital or of some growth pole, c) the availability of advanced transport infrastructure (motorway, etc.). If these preconditions are given, or at least some of them, successfully completed with advantageous spatial and social conditions, the chances of dynamic growth in the region concerned are much better than otherwise.

The measuring of regional performance, or a correct comparison of the economic potential of regions, especially of smaller regions is quite difficult due to a lack of adequate data, which are available at macro-level (Table 1), but are missing or are not of a satisfactory quality at regional level (See Table 2 and 3.). This applies even more, if we wish to compare bordering regions. In this case, especially when labour market developments are concerned, not NUTS 2 or NUTS 3 levels are interesting, but rather smaller entities, where adequate comparable data are really scarce. (See Figure 1).

From the point of regional labour market developments in case of bordering regions, it is important that not country borders but regional borders will determine the frame of labour market. Our analysis focused on the bordering regions of Northern Hungary and Eastern Slovakia on the one side, and on the North-Western Hungarian regions and the Slovak border regions Nitra and Trnava on the other. Although these regions are along the two

sides of the border, their development patterns show substantial differences. In the case of Hungary North-West Hungarian regions (like Győr-Moson-Sopron or Komárom) belong to the most well developed regions of the country, whilst the bordering Slovak regions are socially and economically less developed regions, with a high share of Hungarian ethnic population, and with a fairly unfavourable labour market situation. However, parts of these two Slovak NUTS 3 regions (especially Trnava) still benefit from the pull effects of the closeness of the capital Bratislava, and recently from the presence of foreign investors. On the other hand the two Eastern border regions mentioned (Northern Hungary consisting of the Borsod-Abaúj-Zemplén, Heves, and Nógrád counties (NUTS 3 regions) in Hungary and the Košice and Prešov higher territorial VUCs—NUTS 3 regions in Eastern Slovakia have in common that they are the most underdeveloped regions in their country. According to Eurostat data both of these regions belong to the 10 poorest of the European Union<sup>38</sup>. It is worthwhile to mention that along the Slovak-Hungarian border the level of economic development of the concerned NUTS 2 or NUT 3 regions is falling behind when moving from the West towards the East.

*Table 1: Some major macroeconomic data comparing Hungary and Slovakia*

	Hungary					Slovakia				
	2003	2004	2005	2006	2007	2003	2004	2005	2006	2007
Real GDP	4.1	4.9	4.2	3.9	1.3	4.2	5.4	6.0	8.5	10.4
Inflation (HICP)	4.7	6.8	3.5	4.0	7.9	8.4	7.5	2.8	4.3	1.9
Unemployment rate (ILO)	5.9	6.1	7.2	7.5	7.4	17.6	18.2	16.3	13.4	11.1
Current account deficit as a % of GDP	-8.1	-8.1	-6.0	-5.0	-4.0	-0.9	-3.4	-8.6	-8.3	-5.4
Deficit of the state budget as % of GDP	-6.5	-6.6	-7.8	-9.2	-5.5	-3.7	-3.0	-2.9	-3.6	-2.2

Source: Eurostat, national statistics

As an interesting case study for regional labour market monitoring we have conducted an analysis on labour market in the Slovak-Hungarian bordering regions, especially for North-West Hungary and South-West Slovakia. As a special phenomenon, these regions are target of EURES-T partnership supported by the European Union. Due to a high share of ethnic Hungarians on the Slovak side, the natural evolution of social and economic contacts could be anticipated.

As to the availability of data at the level of small regions, to provide for comparability is not quite easy. Data for national accounts and labour market one can find both in national statistics and under Eurostat for NUTS 2 level, and with some restrictions for NUTS 3 level. However, when analysing developments in bordering regions, the level of smaller regions is much more interesting. In that case data from settlements and from enterprise surveys can be used, however, one will already have some problems with a reliable comparability. When trying to draw some picture on regional labour market developments in bordering regions, we relied on data from the micro-census 2001, from data on working permits provided by the State Employment Service in Hungary.

<sup>38</sup> Prešovský region reaches the lowest GDP share of all NUT 3 regions in Slovakia. The same applies to county Nógrád in Hungary.

Table 2: Regional economic indicators on the two sides of the border

NUTS 3 level	Average gross earnings *		Unemployment rate *	Per capita GDP (PPS) **	
	Euro (PPS)	As a % of the national average	%	1000 euro (PPS)	As a % of the national average
Győr-Moson-Sopron	1103	101	4,3	16,5	116
Komárom-Esztergom	1001	92	7,5	16,0	112
Pest	973	89	5,9	12,7	89
National average	1087	100	7,5	14,2	100
Nitra	661	84	17,8	12,1	88
Trnava	732	93	10,4	14,2	107
National average	790	100	16,2	13,6	100

\* Hungary. 2005, Slovakia 2005, \*\*Hungary. 2004, Slovakia 2005

Source: KSH STADAT online database, [www.statistics.sk](http://www.statistics.sk)

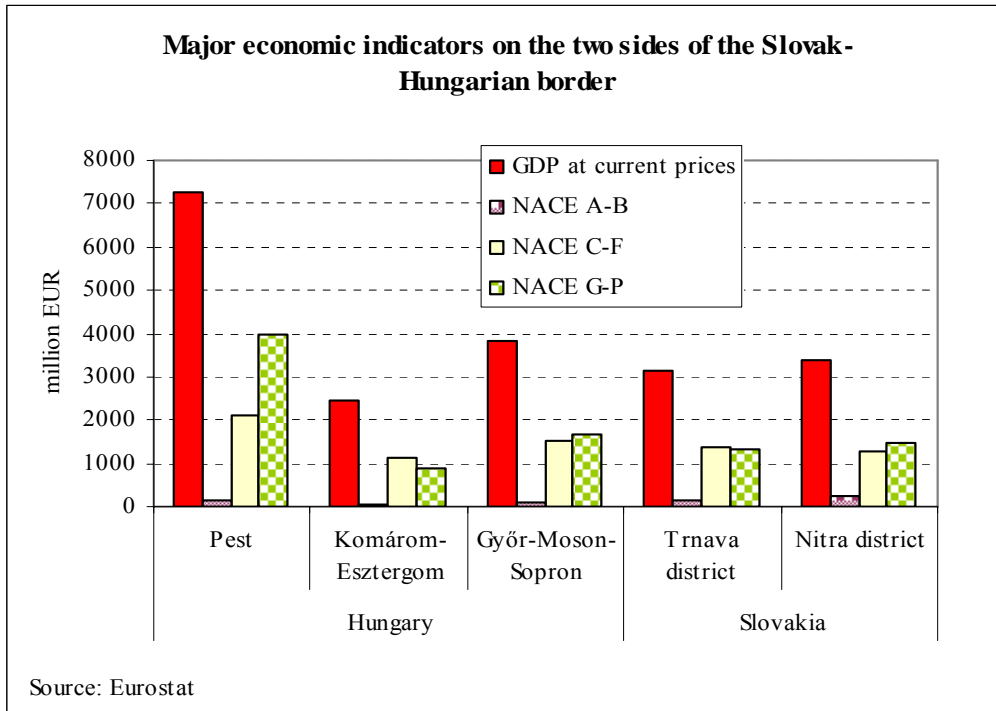
Table 3: Labour Market Situation in Bordering Regions, 2001

Region	Activity ratio (as a % of the population of 15-59)		Employment ratio (employees as a % of the population 15-59)%		Unemployment (unemployed as a % of the population of 16-59)	
	Slovak	Hungarian	Slovak	Hungarian	Slovak	Hungarian
NUTS4 regions along the border	79,9	67,6	49	63,3	31	4,3
NUTS3 regions along the border	79,9	66,1	55	61,5	25	4,7
National average	79,9	64,0	60,7	57,5	18,6	6,5

Source: National statistics, Microcensus 2001

## Characteristics of the Economic Structure at the Level of Small Regions alongside the Slovak-Hungarian Border.

Figure 1: Characteristics of the economic structure at the level of small regions alongside the Slovak-Hungarian border

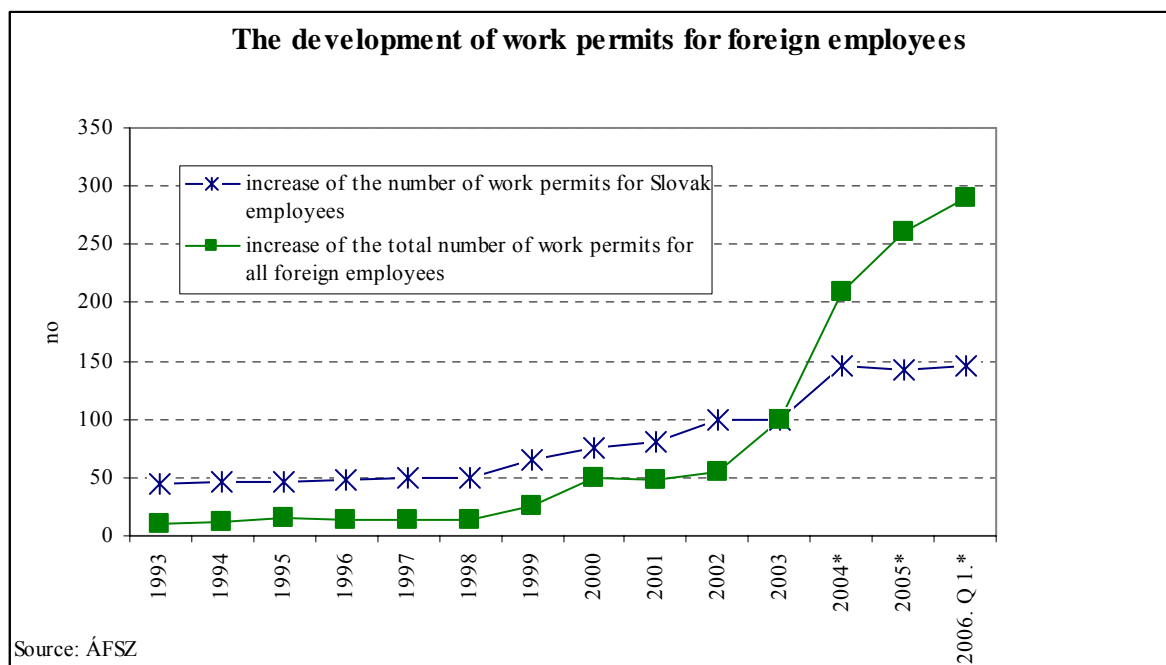


As a general statement it should be mentioned that migration in the region started already well before accession of the two countries to the European Union. As a first step, in 1999 bilateral Slovak-Hungarian inter-governmental agreement opened the opportunity for employment in each other's country. The agreement framework permitted a quota of 400 persons at first which was raised substantially within a short time. From the beginning on this was a one-sided interest on behalf of the Slovak side, and this is the case even today. Since 2001 there is practically no limit of employment of Slovak employees, the legal condition of their durable staying in Hungary is provided by a valid labour contract. Since 2004 the job-seeking of Slovak employees has gained impetus, and their importance in the Hungarian labour market increased, but not generally, but regionally concentrated, especially in the bordering regions on the Hungarian side. Taken as a whole their share increased from marginal at the beginning up to 10% prior to accessions, and afterwards it raised further reaching about 25% of foreign employees by now. This kind of rate of increase proved to be unique, well above the rate of growth of the number foreign employees of any other origin. (See Figure No. 2.)



## The Development of the Number of Total Work Permits for Foreigners in Hungary as Compared to Slovak Employment

Figure 2: The development of the number of total work permits for foreigners in Hungary as compared to Slovak employment



\* All employees with a working permit (including non EU citizens), employees with green cards, registered EU employees.

Source: statistics of work permits, ÁFSZ

Another interesting phenomenon, and here comes the importance of regional labour market monitoring, is the regional concentration of Slovak labour in Hungary. As already mentioned we conducted two regional researches concerning the Slovak-Hungarian border regions. One focused on the border regions West from the Danube, the other on the border region East from the Danube. As it is well-known, there is a substantial development gap between the Western and the Eastern part of Hungary, and the gap is even larger when we compare the performance of the Central Hungarian region comprising the capital, Budapest, with Northern Hungary being one of the looser of the transition period. So it is not surprising that migrants from Slovakia are concentrated in the Western part of Hungary, especially in regions along the North-West border. Almost 80% of them sought and found here a job, and most of them are not settled, but they are commuting.

However, it is worth to mention that whilst other ethnic Hungarians coming from Rumania, Serbia or Ukraine, are found mostly in the Central Hungarian region, that is in the agglomeration of Budapest. Employees of Slovak origin are an exception from this respect, since they are regionally concentrated, especially in the district of Komárom-Esztergom (more 80% of all foreign employees in the region), and to a lesser extent in Győr-Moson-Sopron (around 50% of all foreign employees in the region).

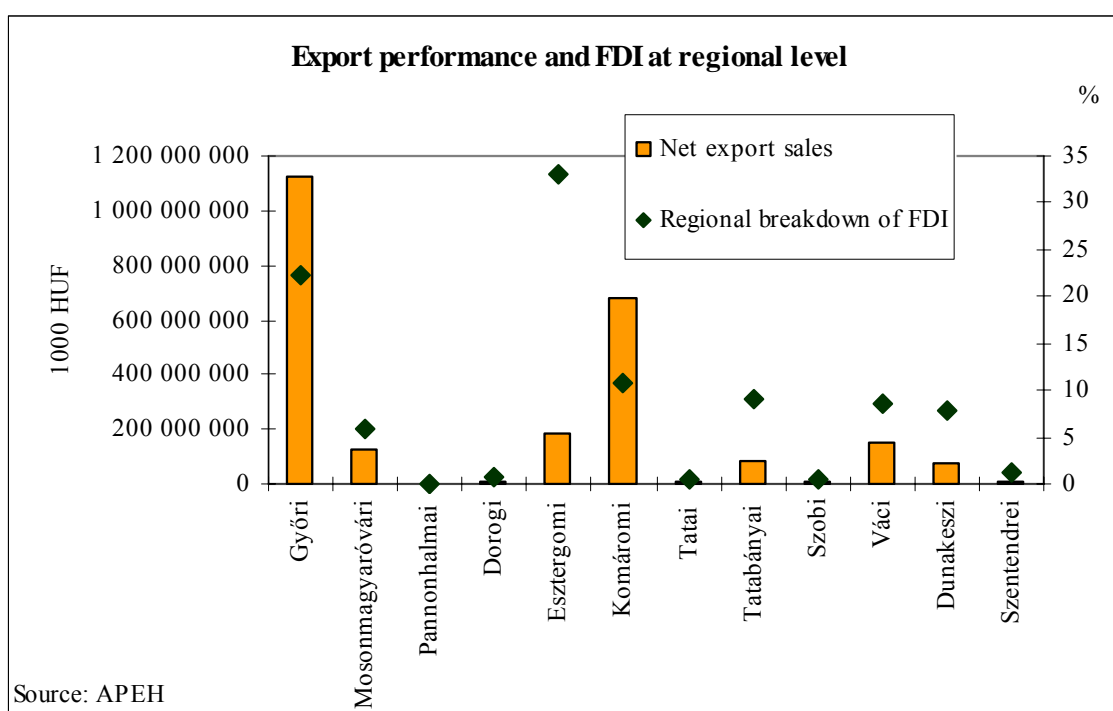
The above development trend can be explained by a number of reasons. The different development path of Hungary and Slovakia resulted in differing wage development trends. Despite of the fact that a convergence of wages to the European level has already started

in Slovakia, and will be accelerated as a consequence of the introduction of the euro, there is a substantial gap between Hungarian and the Slovak wage level. Reckoned at PPS parity Slovak average wages reach about 85% of the Hungarian level (2005), in case of minimum wages the gap is even larger. There are special differences in the wage development at the two sides of the border. Whilst in the North-West Hungarian regions wages are around the Hungarian average level, and activities demanding more qualification and higher wages are settled, whilst on the Slovak side wages are 10 to 20 % lower than the Slovak average. Reckoned in terms of PPS wages on the Hungarian side are almost twice as high as in the Slovak bordering area. The share of low paid agricultural activities are anyway higher than on the Hungarian side, and unemployment is very high (around 10 to 20%), whilst on the Hungarian side the labour market situation is much better. However it should be emphasised that the favourable situation on the Hungarian side is due to the presence of a couple of foreign firms (like Suzuki, Audi or Nokia.). (See Figure No. 3.)

Under these conditions it is not surprising that Slovak migrants are working mostly in manufacturing industries, and therein in the first line in car manufacturing, metal processing and electronics.

### Regional Concentration of FDI Explains the Regional Concentration of Employment of Foreigners

Figure 3: Regional concentration of FDI explains the regional concentration of employment of foreigners



Whilst on the Hungarian side of the mutual border industry parks and clusters have been developed supporting the cooperation between enterprises of the region, and encouraging the development of suppliers and related servicing activities. At the same time on the Slovak side the backwardness of the local infrastructure, the poor financial position of the concerned local public administration and the missing institutions for encouraging

investments, failed to attract firms and capital, or FDI to the regions, thus local labour was forced to find jobs otherwise.

This brief portrait of the two bordering regions (Northern Hungary and Eastern Slovakia) shows a lot of similarities. In spite of the fact that their geographical positions and the similar level of economic development would provide a potential for a good cooperation, there is limited experience in this direction so far. Future trends in possible cooperation between economic players of the two regions will be affected by the differences of the macro-economic development path to be followed in the two countries. Prevailing data and information suggest that whilst Slovakia will remain most likely one of the most dynamic country in Eastern Europe, economic growth in Hungary will most likely slow down in the coming years. A catching-up to the EU average will continue in case of both countries, however, at a different pace, thus the prevailing welfare differences between the two countries might become narrower.

Different kinds of contacts, like labour migration, are more characteristic in case of the border region of Western Hungary and Western Slovakia. Contacts between enterprises could be fostered by the development of the transport infrastructure in both regions, as planned by the National Development Plans. Comparative advantages of the prevailing Slovak tax-system will encourage investors to move in the region, if other preconditions are provided for as well. For Hungarian investors in general Slovakia is already one of the major objective, thus besides Netherlands, Germany and Austria Hungarian firms are the largest investors. Bilateral trade has revived in the course of the last years, especially exports of Hungarian firms expanded. All in all, the conditions for an increased cooperation in general are not bad, now it is the tasks of the local players to find better contact to each other. Local economic contacts cannot be encouraged simply from outside, they have to be built on prevailing social, cultural, human networks. Policy makers should pay more attention to the importance of these networks, should rely on and encourage them.

As regards the development of the economic cooperation of bordering regions along the Slovak-Hungarian border, the future economic path of the two countries will be of importance: in this respect the Hungarian economy entered a path of slower economic development, whilst the Slovak economy has become one of the most dynamic countries in the East-European region. Our analysis proved that the economic difference between the bordering regions are at present larger than those at macro-level, however the acceleration of growth in Slovakia might contribute to the moderation of these differences.

Relations and cooperation between enterprises of the two sides of the border could benefit from the development of the transport infrastructure, from the creation of horizontal transport networks on both sides of the border, contributing to a better availability between of rural and urban areas.

From the point of view of the future development of the discussed border region the individual decisions of one or two major investors (especially foreign investors) will be of importance. In case of Hungary, wage convergence and the macro-economic situation might encourage investors to leave, and look for other settlements, which would cause severe problems, especially as regards regional labour markets, and the job opportunities of Slovak migrant labour.

Research done on the development of economic clusters show (Novotny, 2005) that macro-economic policy in itself has limited assets to encourage network building when social, cultural and human relations are missing. In case of bordering regions they could benefit from the synergy of various services like transport, networks, health services,

communal services etc. This could help to a better flow of labour and encourage neighbourhood relations.

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### 1.3 Using the Conceptual Avenue of Regional Labour Market Monitoring

#### Introduction

Conceptual elements of the 'Regional Labour Market Monitoring' instrument are brought together here, in order to specify how a conceptual framework for target group monitoring can be applied to migrants. While in the previous contributions an informational basis was built up, primarily for the use of political actors, and made available to politically oriented institutions, a different tact is taken here:

The starting point for all conceptual considerations is the user of the information. This includes all actors that are relevant for a regional labour market. On the one side, there are the strategic actors who, directly or indirectly, make decisions on labour market political strategies which are implemented within a regional labour market. This includes politicians or association representatives. On the other side, there are operative actors. These are all persons directly involved in a regional labour market. These can be the actors with a demand for labour; to wit, the enterprises. The balance side is made up of employees, job searchers, the unemployed or regionally operating institutions for qualification or consulting. The various strategic and operative actors can have dissimilar needs for information. These must be comprehended and defined as informational elements in a regional target group monitoring. Information should reliably satisfy quality criteria in current and, as needed, prognostic situations, but above all, the information must be adequate to meet the needs of the actors. Regional labour market monitoring is, however, not only limited to the generation and distribution of customised information. More importantly, a central element of the monitoring process is the communication of the information to the regional users. This can be conveyed over various media such as workshops, print media or web-based information systems. Delivery of this information should be tailored to the specific conditions of the local area. It is of critical importance to ensure that the information actually reaches all users. Since monitoring is understood here as a continuous process, this implies that information must be continuously made available. One result of this implication is that updates in the data should be generated at regular intervals. A third conceptual element of the monitoring process is the translation into action. This demands that regional actors, particularly the strategic actors, reach an understanding related to actions with direct impact on the regional labour market, grounded in the generated and communicated data from the monitoring process. Then, and only then, can it be ensured that the functioning of the regional labour market can truly be improved.

Stemming from these conceptual considerations, an approach was developed within the framework of the EU-supported project 'Development of a Target Group Monitoring Concept to Support the Integration of Migrations in Employment'. Project partners from four different European regions participated.<sup>39</sup> The partners from two of these regions, in

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<sup>39</sup> The project was financially supported by the EU – DG Employment, Social Affairs and Equal Opportunities as well as from the Hessen Ministry of Social Affairs. It was conducted within the framework of the Mutual Learning Programme. Project partners were the Institute for Economic, Labour and Culture (IWAK) at the University of Frankfurt a.M. in Germany, the Paul Lazarsfeld Society in Vienna, the Activa Group in Enschede (Netherlands), the Research Institute for Labour and Social Affairs in Prague (Czech Republic) and Translake from Constance (Germany). The project ran from December 2006 until June 2008. For further information: [www.targetgroupmonitoring.net](http://www.targetgroupmonitoring.net).

Germany and Austria, report in this section on how they specified a target group monitoring concept, rooted in both the conceptual considerations outlined above and the specific structural conditions in their regions. These were then applied to the migrant target group. The start makes Waldemar Mathejczyk with his project layout for the German county (*Kreis*) of Offenbach. He specifies an information structure, based on the informational needs of all the operative and strategic actors in the region. The relevant indicators are identified, followed by a detailed discussion of the data situation for measuring these indicators at the regional level. The indicator model presented by Waldemar Mathejczyk is put into action by feeding the data into a web-based information platform made available to regional users. Vera Neisen offers a perspective on starting to build up an information platform and its transition into a running operation. The web-based information platform embodies the communication component of the target group monitoring taken from the conceptual perspective. Following this, Marc Bittner and Michaela Hulder-Seizberger sketch out how a target group monitoring could be implemented for the City of Vienna (Austria). Considered here are also the similarities and differences to the German concept.

This section is closed off with an excursus by Jenny Kipper. She uses elements gleaned from learning theory to show that a user, or demand, oriented approach allows learning processes to occur in the concept implementation as well as in the operation of the monitoring. In her opinion, how these learning processes take place and, adjusted if needed, are decisive for the success of a regional target group monitoring.

## Target Group Monitoring – A Concept for Regional Labour Market Monitoring with Special Emphasis on the Target Group of Persons with Immigration Background

Waldemar Mathejczyk

### 1. Introduction

Despite their internal heterogeneity and diversity, migrants – or persons with immigration background – represent a significant group for labour market policies, one that is to an overwhelming degree badly integrated into the labour market by consistently having large subgroups subject to the problem. Support for this fact can be found in various academic studies of the subject matter from different angles, so that there is no need here to reinvent the wheel and produce another proof of this.<sup>40</sup>

In a EU project a concept was developed from the perspective of regional labour market monitoring that can help solve this problem. What follows in this paper reflects the results obtained towards the end of this eighteen month long project.<sup>41</sup>

### 2. Definitions

The project was one of regional labour market monitoring, that is, long term observation of the labour market, for which concepts for information gathering are needed.

- We can speak of regional labour market monitoring when, within a manageable space of time up-to-date information is generated regularly about the regional labour market.
- In this context, target group market monitoring refers to the regular monitoring of the labour market with a special emphasis on a specific target group, in this case, that of migrants.

Against the backdrop of these basic definitions I will present the concept for a target group monitoring. In doing so I shall concentrate primarily on the variant of the regional concept developed for the Offenbach County in Hesse.<sup>42</sup>

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<sup>40</sup> Nell, W. / Yeshurun, S.-A. (2008): Arbeitsmarkt, Migration, Integration in Europa. Ein Vergleich. Schwalbach. Bade, K. J. (2007): Versäumte Integrationschancen und nachholende Integrationspolitik. In: Aus Politik und Zeitgeschichte (APuZ) 22-23 / 2007, 29. Mai 2007. Beilage zur Wochenzeitung „Das Parlament“. p. 32-38. OECD - Organisation for Economic Co-operation and Development (Ed.) (2005): The Labour Market Situation of Immigrants in Germany. <http://www.oecd.org/dataoecd/28/5/38163889.pdf> (29.07.2007).

<sup>41</sup> This paper presented here is basing on a speech held on 2nd of June 2008 at the Goethe University in Frankfurt am Main (Germany) during the workshop concluding the project.

<sup>42</sup> There were four partner-regions for this project in total. We shall therefore also have a look at the other regions. My colleague Marc Bittner will have more to say about these regions in the paper that follow. He will explain the different background conditions in the regions of Vienna that took part in the project.

### 3. The Background in Offenbach County

The labour market related political background in Offenbach County can be roughly rendered as follows. A large proportion of the population have immigrant background. The unemployment rate is high in general and particularly high for migrants. Within the communities there had been many new initiatives as well as data collections in transition.

Given this background, the following was needed: up-to-date information in the form of key indicators for the purpose of precisely describing the status quo, as well as background knowledge needed for concrete operations in individual areas. In other words, information and knowledge are needed both for making political decisions and for integration work.

At the beginning of the project the following was also known. First, we knew through the European network<sup>43</sup> that there were a variety of approaches to monitoring in existence in various regions of Europe. Second, from different projects in existence we were aware of the diversity of labour market related information sources, specifically about migrants. Given this knowledge, we have tried to bring these things together systematically and closer to practice.

### 4. Working Assumptions

When the project was started we had two working assumptions. The first was that labour market monitoring is a process that, by means of a learning process, allows information to reach regional actors and be transformed into knowledge, which knowledge in turn makes actions that improve the integration of migrants possible.

In conceptualising the whole process we have found a model of information economics helpful. The central claim of the model is that information can lead to more transparent and more efficient organisation of regional labour markets.<sup>44</sup>

The second assumption was that labour market monitoring is a process that can generate information leading to improved integration in the labour market. This idea is based on a matching model, which contains a workforce supply side and workforce demand side. The model implies that labour market integration can be achieved and strengthened by an improved matching, or more precisely, by providing appropriate information about both the workforce demand side and the workforce supply side. Our approach, in all four regions, was therefore this:

- The project partners concentrated on the region and took advantage of the correspondingly small-sized, regional data collections.
- They focused on descriptions of the so-called target group and limited themselves to selected information.
- Moreover, and this was just as important, they observed the communication of information, also when it was part of labour market monitoring.

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<sup>43</sup> European Network of Regional Labour Market Monitoring, see the network's web site <http://www.regionallabourmarketmonitoring.net>

<sup>44</sup> Schmid, A. (2007): Some Theoretical Notes on Regional Labour Market Monitoring – Information, Knowledge, and Communication as Common Elements. In: Larsen, C. / Mathejczyk, W. / Schmid, A. (2007): Monitoring of Regional Labour Markets in European States. Frankfurt am Main. p. 118-126.



## 5. Organisational Framework

The project was proposed by the Hessian Ministry for Social Affairs in Wiesbaden, and approved and awarded by the Directorate-General for Employment, Social Affairs and Equal Opportunities.<sup>45</sup> The Hessian Ministry for Social Affairs also shouldered a large portion of the costs of the project. There were four partner regions in four European countries (Netherlands, Germany, Austria, and Czech Republic) one of which is the Offenbach County, the basis of the Hessian Part of the project for Germany.<sup>46</sup>

## 6. The Concept and Its Structure

The concept to be presented here is in the end a kind of practical manual for interested actors in European labour market regions. It has a process-related dimension and a content-related dimension.

- The process-related dimension aims to render the steps involved in the concept development clear and comprehensible.
- The content-related dimension boils down to the recommendation of the choice of indicators, which I will go through in detail.

### 6.1 Process

Let me first note that there were different levels of mutual learning in the project. First, there were forms of mutual learning on the *regional* level, above all in the run-up to the regional workshops. Then there were forms of mutual learning on the *inter-regional* level, among the partner regions. Those took place during the entire project, through workgroup meetings. Finally, there were forms of mutual learning on the *European* level, as can be observed at European conferences and workshops of the project.

The process of concept development in all four regions essentially consisted of two steps: first an investigation of the so-called regional information needs and second the matching of indicators and data. In other words, desired information in the form of indicators on the one hand and available data and data sources on the other hand were checked to see if they match.

This query of both regional actors was carried out according to a fixed schema that incorporated regional actors, regional information needs, and potential user groups. This approach can be characterised in terms of “user oriented perspective”. We found this important in order to be able to focus on information needs and to not be drowned by a torrent of data. Finally, regional actors were only asked which information they need in order to better accomplish the part of their job related to labour market integration for migrants.

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<sup>45</sup> The project was financed (75 %) by the European Union within the Mutual Learning Programme. This programme was launched at the beginning of 2005 and incorporates the former Peer Review Programme (launched in 1999). Its main objectives are to encourage mutual learning at all levels and enhance transferability about the most effective policies within key areas of the European Employment Strategy, and to promote to stakeholders a wider and more effective dissemination of knowledge about the European Employment Strategy and its implementation.

See <http://www.mutual-learning-employment.net> and [http://ec.europa.eu/employment\\_social/employment\\_strategy/peer\\_en.htm](http://ec.europa.eu/employment_social/employment_strategy/peer_en.htm) (28.07.2007).

<sup>46</sup> The regions are: Region of Twente, Offenbach County, Region of Ústecký, and City of Vienna.

## 6.2 Contents

The result can be specified in the form of indicators, which can be looked at either individually, combined, or in relation to a specific topic area. Accordingly, the concept for Offenbach County can be presented along the following questions: which were the relevant topic areas? which were the relevant indicators? what data are available? what were the possible data sources?

Basically, the following topic areas are significant: information about the employed, information about the unemployed, the adolescent (both employed and unemployed), enterprises run by migrants, initiatives for re-integration into the job market, and finally information about qualifications.

These are the topic areas in which we have formulated the information needs we found. They can be organised, according to the matching model, into those of the demand side and those of the supply side of the workforce. Apart from these six areas there are specific indicators (34 in total) for Offenbach County. Some of these are of fundamental importance, and for this reason we shall call them “core indicators”. Others in contrast have supplementary information content. They are the “standard indicators”. Now, here are some details about the topic areas.

### *Information about the Employment Situation*

As an example, we chose eight indicators for the topic area “employed”. These provide general but key information about the *demand side* of regional labour market with a special emphasis on people with immigration background.

These indicators allow us to characterise the current employment situation in the region and to compare the local with the immigrant population. They operate with the categories of nationality. Finer and subtler distinctions are unfortunately not practicable at this stage.<sup>47</sup> There are furthermore distinctions according to gender and age (15-20, 20-45, 45-65 years old).

*Figure 1: Indicators “Employed”*

1. Number of Employed Persons sorted by Age and Sex: Non-Germans / Germans
2. Number of Employed Persons sorted by Work Place and Residence: Non-Germans / Germans
3. Number of Employed Persons sorted by Economic Sectors: Non-Germans / Germans
4. Number of Employed Persons sorted by Economic Branches: Non-Germans / Germans
5. Trends of Employed Persons sorted by Economic Sectors/Branches: Non-Germans / Germans
6. Number of Employed sorted by School Education/Vocational Training: Non-Germans / Germans
7. Number of Low-paid Employed Persons: Non-Germans / Germans
8. Rate of Employment sorted by Age and Sex: Non-Germans / Germans

<sup>47</sup> OECD - Organisation for Economic Co-operation and Development (Hrsg.) (2005): The Labour Market Situation of Immigrants in Germany. <http://www.oecd.org/dataoecd/28/5/38163889.pdf> (29.07.2007). Arbeitsstelle Interkulturelle Konflikte und gesellschaftliche Integration (AKI) (2005): Migrationshintergrund von Kindern und Jugendlichen: Wege zur Weiterentwicklung der amtlichen Statistik. Bundesministerium für Bildung und Forschung; Bildungsreform, Band 14. Berlin.

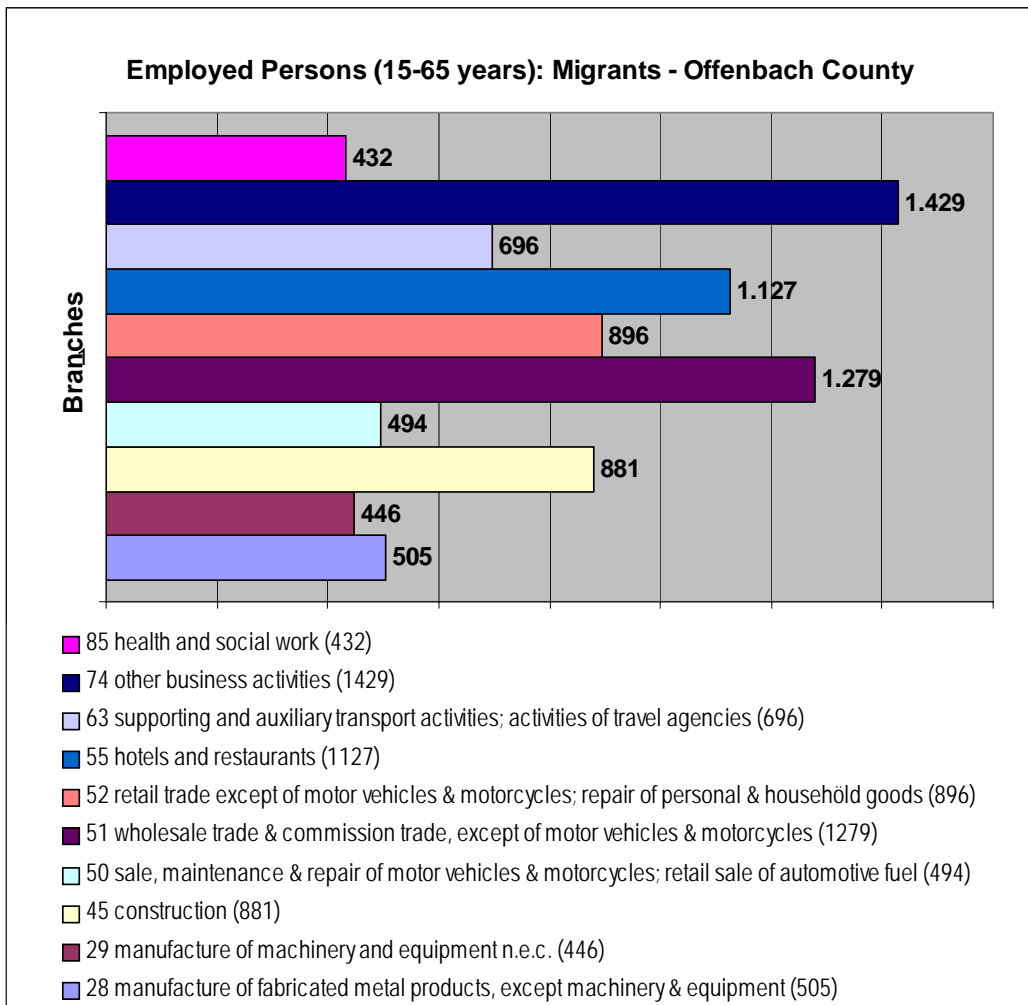
The basic source for data is normally some official statistics about the number of dependently employed. The data sources were the institute IAB Hessen<sup>48</sup> and the local government Offenbach County<sup>49</sup>. This means that we were, by using these data, concentrating on those people who appeared in official statistics.

These indicators have basically this information content: if one knows how the employment numbers develop, one obtains one and just one indication for the success or failure of the labour market policies in the region.

By comparing some of the numbers, that is, those of the local population (Germans) with those of the immigrant population (Non-Germans), we obtain not only indicators for the target group, but also the possibility of a comparative study with the local employed population. Here we have of course not only absolute numbers, but also proportion data.

For not being able to go into every indicator I will however give an overview. Allow me to use an example to make the long list of indicators more intuitively graspable.

Figure 2: Example (1) Employed Migrants in Offenbach County in Specific Branches<sup>50</sup>



<sup>48</sup> Institut für Arbeitsmarkt- und Berufsforschung (IAB - Regional Hessen), Bundesagentur für Arbeit Regionaldirektion Hessen.

<sup>49</sup> Kreisverwaltung Offenbach and ProArbeit – Kreis Offenbach – AöR.

<sup>50</sup> This figure gives only one example: Additional information is given by following distinctions: Age (15-20, 20-45, 45-65 year olds), Sex (men, women), Region (Offenbach, Hessen).

Let us look at as an example (see figure 2) the employment situation in specific business sectors of the region. This example shows ten business areas, areas in which migrants are active, that have the strongest employment numbers. We can interpret these data by asking the following questions. First, which sectors are these? In other words, where are the jobs? Second: which occupations are represented and requiring what kind of education and vocational training? Perhaps also this: which enterprises are these, in case they are large enterprises in the region?

Apart from this figure, one discovers that the ‘top ten’ areas of employment for Germans are different from those for migrants. For example, employment of Germans in “government administration, defence and social insurance” related areas are disproportionately high. In contrast, for migrants, the “hotel and restaurant industry” is an additional ‘top ten’. One observes also that in Hessen the concentrated areas of employment for both target groups are somewhat scattered, so that there are no easily recognizable centre, which again supports our regional data. One could also look at the whole thing in its development in time and discover that the employment numbers have increased for certain sectors, for example the health care sector for migrants.

My main concern in this example is not to present the precise numbers, but to illustrate the fact that, if one knows that there are currently employment opportunities for migrants in sector X or Y, one can be sure that there are also jobs in this sector in the future. One could then assume that job seekers would be able to find employment there or can at least be directed to this area for their search. If moreover specific employee profiles are sought after in this sector, one can check those registered as unemployed for these qualifications or adapt their qualifications to match the requirements.

This ‘sector indicator’ gives moreover information about which sectors have employment potentials in the region. This information can of course be differentiated according to gender and age categories. Let this suffice for a short commentary on one of the indicators from the topic area ‘employed’.

### *Information about the Unemployment Situation*

The indicators for the topic area “unemployment” are the following eight. They provide key information about the *supply side* of regional labour market. They allow an overview of the labour market situation with a focus on those seeking jobs and make it possible to make comparisons – that means, as with the employment numbers, between Germans and non-Germans.

Figure 3: Indicators “Unemployed”

1. Number of Unemployed Persons sorted by Age and Sex: Non-Germans / Germans
2. Number of Unemployed Persons sorted by Regional Distribution: Non-Germans / Germans
3. Trends of Unemployment Rates (2001-2007): Non-Germans / Germans
4. Number of Unemployed (long-term/short-term) “without school education“: Non-Germans / Germans
5. Number of Unemployed (long-term/short-term) “without information concerning school education“...
6. Number of Unemployed sorted by School Education/Vocational Training: Non-Germans / Germans
7. Specific Groups of Persons registered as Unemployed: Non-Germans / Germans
8. Trends of Unemployment Rates sorted by Regional Distribution: Non-Germans / Germans

The basis for data is normally some official statistics about the number of recipients of social insurance services currently registered with the labour administration. Unregistered unemployed are thereby not counted.

The following can be said about information content. If one knows how the jobless rate in the region is developing, one would have, as counterpart to the employment situation that we have seen above, a further indication for the success of labour market policies in the region. By comparing these rates one can draw further conclusions about the labour market policies, including necessary measures to be taken. Moreover, conclusions can be drawn about selected subgroups<sup>51</sup>.

Allow me to mention an example in this context as well, focusing this time not on how the substance of indicators may be interpreted but on various forms of presentations. That means numbers, tables, and graphs.

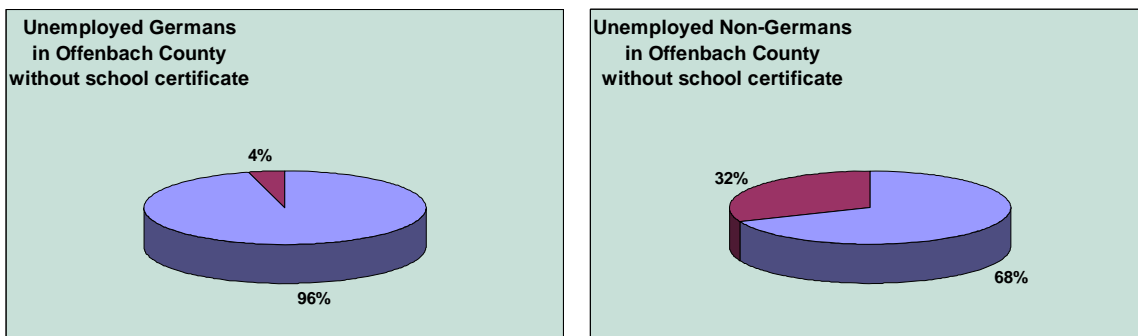
Figure 4: Example (2a) Unemployed Persons without School Certificate

	Unemployed Persons		Unemployed Persons “without School Certificate“	
	Hessen	Offenbach	Hessen	Offenbach
Total	98.724	5.598	8.969	553
Germans	83.300	<b>4.468</b>	3.851	<b>197</b>
Non-Germans	15.401	<b>1.130</b>	5.118	<b>356</b>

The example shows the proportion of unemployed in SGB III without a school certificate in relation to all those unemployed, first in numbers, then in a graph. One can see that the numbers look at first glance rather “harmless”. The graph, when looked at more closely, looks quite “dramatic”. For the sake of completeness let me note that the proportion of unemployed in SGB III (unemployed up to 12 months) without a school certificate in relation to all unemployed is much higher for non-Germans.

<sup>51</sup> For example, the “short term unemployed” according to the German Sozialgesetzbuch SGB III, and the “long term unemployed” (more than 12 months) according to SGB II.

Figure 5: Example (2b) Unemployed Persons without School Certificate



What else can be said about the indicators for the area “unemployed”? Well, if we know which sub-groups suffer particularly strongly from unemployment, we can formulate initiatives and appropriate measures in various areas of employment agency, re-integration, training, and qualification based on such findings.

Depending on the size and structure of a regional labour market, specific information about sub-regions can be significant. Such information allows insight into the internal structure and gives clues about possible measures to be taken about specific problem areas.

Moreover, information in the form of unemployment rate for individual nationality groups can be formulated. In doing so the target group of migrants will be looked at more differentially, as far as it is possible. We have limited ourselves to the five largest population groups. These are for Offenbach County people from Turkey, from Italy, from the states of former Yugoslavia, and from Poland. All the others were under 3% of the entire immigrant population. That is all I am going to say about the topic area “unemployed”.

#### *Information about the Adolescent Persons (both Employed and Unemployed)*

Let me briefly discuss the next area. Clearly the topic area of “adolescent” is closely related to the two topic areas already discussed. In this area the focus is on general quantities about the employment and education situation, particularly those of the age group 15 to 18 year olds, sometimes also 15 to 20 or 15 to 25 years olds.

Figure 6: Indicators “Young Persons”

1. Number of Employed Persons (15-18 years old): Non-Germans / Germans
2. Number of Employed Persons (15-18 years old) in Apprenticeship: Non-Germans / Germans
3. Number of Employed Persons in Apprenticeship (15-21 years old): Non-Germans / Germans
4. Rate of Unemployed Persons (until 25 years old): Non-Germans / Germans
5. Number of Young Persons leaving School “without certificate“: Non-Germans / Germans
6. Number of Young Persons (15-20 years old) sorted by School Education/Vocational Training: ...
7. Number of Employed (15-18 years old) sorted by Vocational Training: Non-Germans / Germans
8. Number of Young Persons entering the Labour Market: Non-Germans / Germans

Information in this area can help supply precise information about the transition from school to career, which is generally seen as a problem area, and contribute thereby to the long term improvement of labour market integration.

With this limited set of indicators the aim is not in depth study of the indicators themselves, but rather to use them to form a rough idea about the employment situation of this subgroup of the target group.

#### *Information about Enterprises operated by Migrants*

Indicators for the topic area “enterprises” offer more information about the demand side of labour market. Here special attention is paid to the so-called “migrant enterprises”. These are enterprises whose owners either have a foreign passport or are naturalized German citizens. They do not include subsidiaries of enterprises whose headquarters are in a foreign country. Systematic data about these enterprises in Offenbach County do not yet exist. But data collections in this area can be built up.

We made two assumptions in this topic area, both of which will be examined later when we interpret the monitoring information. The first assumption is that the readiness to launch a business is comparatively high among the migrants. The second assumption is that enterprises founded by migrants prefer to hire migrants and therefore tend to create jobs for this group of the labour market.

*Figure 7: Indicators “Enterprises”*

1. Number of Registered Enterprises owned/operated by Non-Germans
2. Number of Enterprises owned/operated by Non-Germans sorted by Years of Existence
3. Size of Enterprises (Number of Employees) operated by Non-Germans sorted by Nationalities
4. Number of Enterprises owned/operated by Non-Germans with apprenticeships
5. Number of Enterprises owned/operated by Non-Germans sorted by Economic Sectors
6. Trend of Enterprises owned/operated by Non-Germans sorted by Economic Sectors

This means that if one has the information described, one will be able to estimate whether the segment is one with notable potential for employment. Moreover one will gain insight into the structure of this segment of the economy in terms of sector-distribution, operation size, as well as employment and vocational training possibilities.

#### *Initiatives for Re-Integration into the Labour Market*

Indicators for the topic area “initiatives” aim to arrive at an assessment and estimate of the labour market integration initiatives in the region as a whole. Currently a region such as Offenbach County is split in two in terms of labour market administration, roughly, into the area of the National employment agency (Bundesagentur für Arbeit) and the area of the Local government of Offenbach County (Kreisverwaltung Offenbach). But fundamentally in considering initiatives one should consider all and every activity that contributes to labour market integration. This is another area in which there do not yet exist appropriate indicators on the regional level, which would nonetheless appear reasonable. There are data collections that can be used here and there, but they require systematic overhaul.

*Figure 8: Indicators “Initiatives”*

1. Number of Measures / Initiatives: Non-Germans / Germans
2. Structure of Participants (Age, Sex, Nationality): Non-Germans / Germans
3. Types of Measures / Initiatives: Non-Germans / Germans
4. Indicators for the Success of Integration Measures / Efficiency of Integration Measures)

The indicators chosen for this topic area allow us to know the number and the content of the initiatives as well as the way they are carried out. If one knows what are all the initiatives taking place in the region, one will have a place to start for refining the labour market policies. In addition one learns which participants (e.g. grouped by nationality) take advantage of the initiatives offered, and whether the target group has been reached or is represented in proportion to their size in the population.

#### *Information about Qualification*

The sixth and last topic area is somewhat different from the rest, for the reason that it concerned with personnel data rather than with structural data, as was the case for the previous five areas. Each of the regions has seen different developments of systems for compiling qualification information. In any case, the precise description of qualification constitutes another topic area, in which more precise information seemed to be desirable.<sup>52</sup> I shall skip this topic in this paper. There are consequently also no further indicators assigned. In a way it is a topic by itself, even though it does appear in the overall concept.

#### *Conclusion*

To briefly summarise what has been said up to now: these are the main topics for Offenbach County. The indicators for the most part have been established. A few are subject to interpretation. Some are still to be made precise. Some are unambiguous. Others are perhaps new.

Concerning the availability of data the following can be said. Much data has been collected and put together and could be made available in the foreseeable future, also for other regions. Some data is however not yet available. These gaps must be bridged. The concept as such however is established.

From this indicator list a few core indicators can be named that may be regarded as so important that they should be made available as basic information for all regions in Hesse and perhaps also for further European regions.

That would be selected indicators out of the 34 that have been presented (see Appendix). One can of course discuss and modify the core list, if one would like to adopt the concept or parts of it.

<sup>52</sup>

The overall concept is available: Bittner, M. / de Bruin, P. / Mathejczyk, W. / Musil, J. (unter Mitarbeit von Brachtel, M. / Hudler-Seitzberger, M. / Larsen, C. / Schmid, A. / Vavrečková, J. (2008): Zielgruppenmonitoring – Regionales Arbeitsmarktmonitoring bezogen auf Migrantinnen und Migranten. Frankfurt am Main.



Each indicator can be found in the overview of a topic area matched to it. This way it can be examined in view of its key significance and necessary data. This fact is important for the assessment of the concept.

For each individual indicator by itself does not mean very much if it is not appropriately interpreted. Consequently the persons who should want to use the information later are also important:

- These users are to begin with representatives of the labour market integration politics at the regional level, who would like to have information about the direction in which the regional economy is developing particularly for the immigrant population.
- Next there are intermediary organisations such as associations working closely with enterprises, commerce chambers, charities, as well as interests groups and migrant organisations that provide services of all kinds for the target group.
- Furthermore there are administrative offices of the employment agencies including the areas of counselling, re-integration, training, and qualification, to name the most important ones. These actors receive for example information about the areas 'into' which they can direct or help train job seekers.
- With this information educational and training institutions and those carrying out government initiatives would be able to orient their services towards key sectors and contribute to labour market
- Even for job seekers this information would be useful to some extent. For it shows the areas with potentials for employment.

## **7. Excursus: Experiences from Other Regions**

There were four regional concepts that had been taken together to a common concept ("master concept"). In the four participating regions there are rather different information needs and different indicators.

Based on the concept presented for Offenbach County one might say that there were, compared with the master concept, other indicators, that is, supplements and extensions here and there. In this connection it is appropriate to adumbrate a number of basic learning effects from the other regions.

- The action-oriented approach from the region in the Netherlands was one of the interesting extensions, and was incorporated into the master concept. The emphasis here is on qualitative information rather than numbers. One wants to have personnel information about persons in the target group, from their own subjective perspective.
- From the region in Austria came the interesting realisation that it is possible to solve the statistical problem of registering people with immigration background. Other than that there were many similar indicators between Offenbach County and City of Vienna.
- From the Czech region there were some interesting indicators regarding the qualification of job seekers. Also of interest was the insight that target group monitoring in a region with low unemployment necessarily have a completely different function, namely, an anticipatory one. Here target group monitoring is an early warning system, much less an instrument for the management of crises.

## 8. Perspectives

The monitoring concept presented here aims to achieve improvement of labour market integration, will be conducted on the regional level, and has a special emphasis on migrants. One general insight gained through the project is certainly this: the indicators should always be viewed from the user perspective. Depending on the context of application, monitoring can fulfil four different tasks. First, monitoring can serve as “stocktaking”, in which case it is rather descriptive. Second, it can help the search for causes, in which case it is semi-analytic. Third, it can be used for measuring integration. Fourth, it can function as an instrument for integration.<sup>53</sup> The concept is to be implemented in Offenbach County, possibly with suggestions from other regional concepts. An implementation phase has been accordingly planned. Concerning the partner regions, we suggest that the concept developed in the Dutch Region of Twente will be implemented there. A pilot project has already been carried out with success. Some communes have also expressed interest. In the other two regions, the City of Vienna and the Region of Ústecký, the situation is still open for various reasons.<sup>54</sup>

## Appendix

Figure 9: List of Core Indicators (Offenbach County)

1. Number of Employed Persons sorted by Age and Sex: Non-Germans / Germans
2. Number of Employed Persons sorted by Economic Branches: Non-Germans / Germans
3. Trend of Employed Persons sorted by Economic Sectors/Branches: Non-Germans / Germans
4. Number of Unemployed Persons sorted by Age and Sex: Non-Germans / Germans
5. Number of Unemployed Persons sorted by Regional Distribution: Non-Germans / Germans
6. Trends of Unemployment Rates (2001-2007): Non-Germans / Germans
7. Specific Groups of Persons registered as Unemployed: Non-Germans / Germans
8. Number of Employed Persons (15-18 years old): Non-Germans / Germans
9. Number of Employed Persons (15-18 years old) in Apprenticeship: Non-Germans / Germans
10. Rate of Unemployed Persons (until 25 years old): Non-Germans / Germans
11. Number of Young Persons (15-20 years old) sorted by School Education/Vocational Training: ...
12. Number of Employed (15-18 years old) sorted by Vocational Training: Non-Germans / Germans
13. Number of Young Persons entering the Labour Market: Non-Germans / Germans
14. Number of Registered Enterprises owned/operated by Non-Germans
15. Size of Enterprises (Number of Employees) operated by Non-Germans sorted by Nationalities
16. Number of Enterprises owned/operated by Non-Germans sorted by Economic Sectors
17. Number of Measures / Initiatives: Non-Germans / Germans
18. Structure of Participants (Age, Sex, Nationality): Non-Germans / Germans
19. Types of Measures / Initiatives: Non-Germans / Germans

<sup>53</sup> In this nexus belong also monitoring systems of various kinds, such as the German Wiesbadener Immigrant Monitoring, the Berlin INTI project, and the one of the KGST (see literature).

<sup>54</sup> The final report will be published shortly, with detailed information about the project, which also puts the topic of the regional concepts in a bigger context.

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## **A Web-Based Information Platform as Means for Communicating Information in the Process of Target Group Monitoring**

*Vera Neisen*

All labour market actors, be they politicians, placement officers, counsellors, or actors in qualification initiatives, are confronted with the challenge of bringing unemployed persons with migration background - a group disproportionately affected by unemployment - (back) into employment. To deal with the challenge adequately requires far more than just access to general labour market statistics. A lot of more specifically relevant information can be obtained with specially developed labour market monitorings tailored to target groups that aim to provide necessary information for political and practical decisions and actions. But these are often accessible only with relatively high costs and are difficult to transfer to other regions.

To deal with this problem, the IWAK in Frankfurt (Main) is carrying out a research project aimed at implementing a web-based labour market monitoring with migrants as the target group. It is the follow-up project of the EU project "Target Group Monitoring", which was also partly funded by the Hessen Ministry of Social Affairs. The project creates a comprehensive information basis with which target group specific initiatives of matching and qualification for labour market integration can be arranged more effectively or even completely from scratch. To achieve that, an internet-based information platform has, among other things, the advantage of making information available to interested labour market actors without any restrictions of time and place, and doing that relatively cheaply.

Offenbach County in Hessen functions as a pilot region. It is characterised by a percentage-wise large population with migration background, and exhibits a relatively high unemployment rate. Since Offenbach was a participating region in the EU project "target group monitoring", it has already developed a concept for the labour market politically important target group of migrants, which it can draw upon while implementing the internet-based labour market monitoring.

The project progresses through four stages, to which we now turn.

### **1. Determination of the Content and Form of Data Preparation**

The internet-based labour market monitoring tailored to the target group of migrants should benefit in particular the regional labour market actors in Hessen. To actually meet their information needs, the project envisages a participatory approach and engages the actors in the selection of public databases and above all in the identification of thematic gaps. Because the basis of the project has already been laid in through the EU project 'Target Group Monitoring', the precise information contents can now be determined through close contacts with the local actors and their feedback on data source and conditions of use. Since the target group aimed at, "persons with migration background", did not appear in official statistics until 2005, and efforts to delimit and define the group still raises difficulties, a specification of this target group is required in the first implementation phase of the project.

Apart from that, not only the consultations to determine the data content to be made available, but presentation and the manner in which data are made available – e.g. in the form of tables, graphics, or texts – also play an important role. Also in this area the project aims to determine the needs of future users and to incorporate these needs in the preparation of databases for web-presentation.

Finally, for the beginning phase of the project, it is essential to determine the basic technical requirements for the implementation of an internet-based information platform. Since the transfer of the instrument to other Hessen counties is planned after the pilot phase in County Offenbach, a variety of different technical conditions will be taken into consideration already in the implementation phase.

## **2. The Building of a Technical Prototype and Tests Involving Future Users**

Before the platform can be put in permanent operation, a range of tests and feedback dialogues with future users are needed. Therefore, the determination of substantive user needs or of the way data are prepared and presented on the web is not the only important component of the implementation concept. Just as important is the fact that the concept envisages, already during the programming of a prototype, intensive involvement of the users in test runs and evaluation of the prototype, and modifications to make use of suggestions for improvement by these future users.

After the programming of a prototype with the infeed of the data is planned. Then, through the specific regional example of Offenbach County, the internet-based information platform will be tested by the users and further modifications will be made based on these tests.

Moreover, for the purpose of long-term quality control of the instrument, the formulation of an evaluation concept is planned in cooperation and consultation with the users.

Finally, with a kick-off event in this phase of the project we not only aim to start the test phase, but also to put various labour market actors into touch with each other and initiate a network amongst themselves.

## **3. Completing Programming the System**

Once the prototype has gone through the test and modification phases, a third phase will begin to complete programming the system. In this phase, the internet-based information system will be so programmed that after the pilot phase in Offenbach County the system can be implemented in other Hessen localities without significant additional expenses.

The modular construction of the platform makes it easily modifiable and extendable and offers the users the flexibility to apply individual components, such as the addition of thematic building blocks that are of interest specifically for individual counties. Moreover, comprehensive documentations will be produced during the completion of the programming. The goal is to ensure that the local operators are able to do small-scale customized programming on their own easily, in order to have the flexibility to adopt changes and meet the specific needs of their localities.

#### **4. Putting the System in Permanent Operation**

The first three stages of implementing the project have been demonstrated by the development and realisation of the internet-based monitoring system in Offenbach County. Afterwards, in a fourth stage of the project, the system will be put into permanent operation. For this, a few more basic structural decisions have to be made.

The first task is to decide what the management model should be in the future, and how the permanent operation will be funded. A further area that requires clarification concerns the right of use and the sponsorship of the information platform: who will be the provider of information in the future, and under what conditions will the information be provided? who has the right to access the internet-based information platform and what are the conditions of use? how will the obligation to protect data privacy be managed? who will be responsible for the regular updating of the system? In order to resolve these questions, and in view of the long term development of the system, it is now being considered whether to initiate a steering group in the region to provide evaluation of the utility and success of the monitoring system and to make decisions about substantive and structural changes.

#### **5. Summary and Looking Ahead: Internet-Based Labour Market Monitoring as Guarantor for Time and Place Independent Data Access.**

Our preview of the individual stages of project implementation makes it clear that time and place independent access to labour market information is possible in an internet-based information system. Moreover, the target group oriented and participatory approach described above ensures that the labour market information provided to the users is actually relevant to them.

The project was kicked off with the closing event of the EU project "Target Group Monitoring" in June 2008. The project will last estimated one year.

## Immigrants in the Vienna Labour Market

*Marc Bittner / Michaela Hudler-Seitzberger*

### The Current Situation

#### ***Facts and Figures***

As of 1 January 2007, a total of 317,991 foreigners lived in the city of Vienna, which amounts to 19.1% of the population. This figure far exceeds the Austrian average of approximately 10% and puts Vienna at the top of all nine Austrian provinces (see MA 5, 2007).

The major groups of immigrants come from the former Yugoslavia, Turkey, Poland and Germany. The largest groups by nationality within the immigrant population (according to the Austrian statistics bureau's Population Register figures from 2006; see Statistik Austria 2006) come from Serbia/Montenegro (24%), Turkey (12%), Poland (7.5%), Germany (7%), Bosnia/Herzegovina (5.5%) and Croatia (5.2%).

Foreign nationals account for about 15% of all employees in the capital city of Vienna (with a total population of approximately 1.7 m), of whom two thirds are from the former Yugoslavia (50% of all foreign employees) and Turkey (15%). The percentage of unemployed foreigners is higher than for Austrians. Unemployment among immigrants – defined here as “foreigners with non-Austrian citizenship” – is now at 11.4%, according to the Employment Agency's current monthly statistics (Arbeitsmarktservice Wien 2007). Unemployment overall, out of the total potential workforce, stands at 8.1%.

The majority of foreign employees in Vienna is concentrated in certain industries, mostly in the lower-income sector. Most foreigners are employed in company-related services (23% foreigners and 15% Austrian nationals), trade (16% vs. 14%), construction (14% vs. 5%), the hotel and restaurant industry (11% vs. 3%) and manufacturing (11% vs. 10%). The percentages of foreigners are far lower than Austrians in public services (6% of all foreigners vs. 22% of all Austrian employees), in the loan and insurance industries (2% vs. 6%), in transport and telecommunications (5% vs. 8%) and in education (1% vs. 2%).

While just 22% of all Austrians are employed in blue-collar jobs, the percentage of blue-collar workers among foreigners is over three times higher. Blue-collar status often means poorer working conditions and social benefits and a lower average income than white-collar jobs or government employment (the latter being restricted to Austrian citizens; see Biffi 2003).

Access to legal work is relatively tightly restricted for foreigners<sup>55</sup> in Austria. The percentage of foreigners (employed or otherwise) is limited to 8% and is contingent on work permits. Permits are granted to employers and allow them to employ one specific foreigner in a designated position. Work permits are issued for one year and can be

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<sup>55</sup> This refers to citizens of third-party states, i.e., citizens of countries that are not members of the 15 original EU countries (for citizens of countries that joined the EU on 1 May 2004, transitional regulations regarding free access to employment in Austria will be in place until 2011 at the latest), or countries which signed the agreement regarding the European Economic Area (EEA). Citizens of Switzerland are not regarded as third-country citizens.



extended for just one additional year at a time. Whether a permit is issued depends on the current state of the job market, the absence of significant conflicting public and business interests, and the employer's being able to fulfill a number of special requirements. The employment agency must check whether there are any registered unemployed individuals who could perform the specific job. Austrians, those of comparable status, and integrated foreigners must be given preference over new immigrants for any job (Ausländerbeschäftigungsgesetz 2007)

### ***Integration Barriers for Immigrants in the Austrian Job Market***

Poor German language skills often pose a special challenge for immigrants attempting to enter the Austrian job market – this is especially true for the second-largest immigrant group in Vienna, the Turks, whose overall lower level of education puts them at greater risk of remaining unemployed.

Although employers officially claim not to differentiate between immigrants and non-immigrants, poor language skills in fact often influence hiring decisions. Communication problems (often resulting from unbreachable sociocultural differences in attitudes and views) between employers and immigrant workers are often cited as a major cause of conflict in the workplace.

The generally poor level of education of immigrants in Vienna can mainly be attributed to the period of large-scale admittance of migrant workers into Austria in the 1960s and 70s (which Austrian labour market policy did essentially nothing to regulate); these immigrants remained in the country and brought their families with them, resulting in second- and third-generation immigrants whose education was only marginally better than their parents'. Teens of foreign descent are often unable or not allowed to get any further training after completing their compulsory education, and go straight to work in low-skilled jobs to make money quickly. This puts them at a disadvantage on the job market compared to their "Austrian" peers.

People who migrate to Austria with their families are usually not well educated or highly qualified for jobs.

Women immigrants from traditionally patriarchal cultures often find it hard to integrate themselves work-wise, as their cultures do not encourage professional independence in women and are often characterised by heavy social restraints which contradict the concept of independent choices (professional or otherwise).

On the other end of the spectrum, well-qualified immigrants to Austria are often subject to a process of de-qualification, as they find themselves unable to use their education and skills and have no choice but to take jobs beneath their capabilities. This is often a result of the difficult-to-impossible process of gaining official recognition for foreign-earned degrees.

A certain degree of "everyday racism" must also be acknowledged, which is present in all sectors of the population including hiring managers; equally well-qualified immigrants often experience discrimination compared to Austrian candidates for the same job, or are offered positions with no opportunity for advancement (see Manolakos/Sohler 2005).

## **Requirements and Challenges for a “Target Group Monitoring” Project for Immigrants in Vienna: Results of the Expert Survey**

The “Target Group Monitoring” project (which surveyed experts including representatives of city employee and employer organisations and unions, employee support organisations in Vienna, the Vienna employment agency, Vienna city administration, immigrant counselling centres in Vienna, and researchers specialising in immigrant issues) produced reasonably satisfactory results, as the data on employment and unemployment of immigrants were largely officially documented. However, it was generally felt that this data, some of which was scattered, should be more systematic, structured, regularly gathered and accessible.

A comparison between unemployment figures for immigrants (foreign nationals broken down by country of origin and region) versus the Viennese population was cited as one of the most important elements a target group monitoring project should aim for. Correspondingly, employment statistics (broken down at least by major business sectors) also need to be gathered in order to determine factors such as the percentage of immigrants according to business sectors.

Inasmuch as integration into the job market does not consist merely of getting a job per se, but should also be a factor of the quality of the work, “income” (as measured by buying power parameters) should also be an important and relevant indicator (e.g., median incomes of foreign citizens compared to the Viennese population), and following on from that, poverty risk as an indicator, which according to EU standards is measured as 60% of median income.

Gender should also be included as a factor in all indicators. In addition, comparable groups should be examined as such (blue-collar workers of foreign/Austrian citizenship, white-collar workers of foreign/Austrian citizenship, etc.).

The experts also noted the problem that immigrants are often unable to cope with the hurdles involved in registering themselves as unemployed or seeking work, and could thus in fact be under-represented in the unemployment statistics. This situation should be addressed.

A major problem the experts surveyed cited was the fact that qualifications earned in foreign countries are not adequately documented and recognised (particularly in consultations with the employment agency); similarly, degrees from foreign universities are all but impossible to have officially validated, leading to an increasing “de-qualification” of well educated immigrants and their skills being taken advantage of in lower-paid jobs. New recording systems, some of which have been implemented (e.g., while attending German courses provided by the employment agency) could help rectify this situation.

The experts surveyed also mentioned the need to record the education process among children of immigrants, meaning for example the systematic documentation of the percentage of immigrants in all types of schools, in order to recognise and combat the resulting potential problems immigrants face on the job market.

Another important factor is the need for a structured documentation of “work biographies”, which is currently non-existent, in order to examine immigrants’ frequent job changes, recurring intervals of unemployment, etc., and to better combat this issue.

It also became evident during the study that the process of immigrant-specific labour market integration must look more closely at the subjective assessment of those most

affected: the immigrants themselves. Immigrants' problems must be identified (using both secondary statistics and primary empirical data within the group of immigrants themselves), in order to identify the objectives of integration and to plan and carry out appropriate steps.

In addition, the degree of "social integration," e.g. health or residence statistics, could become meaningful indicators which are inevitably connected with work factors. For example, poor health could indicate job-related pressures, or the neighbourhood where an immigrant lives could indicate the possibility of using social networks, which are increasing in importance in the working world.

Some experts mentioned their inference or qualified observation that "unregulated professions" (for which no state certification is required) are often used as a loophole in the job market in cases where employment is either legally impossible or is blocked by other hurdles such as competition for available jobs.

The results of a new study by the city of Vienna on "Ethnic Economies," dealing with foreign business owners, are now available. "Ethnic Economies" actually refers to companies with an "immigrant background" (Enzenhofer et al. 2007). The results show that about 30% of all individually-owned companies in Vienna are run by people with an immigration background. These companies contribute significantly to Vienna's economy, and these contributions result directly in specific steps to increase employment (e.g., by training apprentices, an important element of the job market). The city of Vienna has two important tools to use here: the WAFF (Viennese Employees Support Fund) and the WWFF (Vienna Business Support Fund). These funds are now starting to focus on making their sponsorship options available to immigrants as a target group. Information campaigns and workshops have been launched, and the WAFF has had its web site translated into several foreign languages. The potential of this group is to receive targeted support.

### ***On the Difficulty of Analysing "People with an Immigrant Background"***

A particularly difficult issue - as the last example points out - mentioned by the experts surveyed is the lack of consistent data on people of foreign descent (i.e., people born in Austria who have Austrian passports, those who have acquired Austrian nationality, etc.), for whom very few statistics have been gathered. The "citizenship concept" as defined in the statistics system does not function well in regions with a long history of immigration and migrant workers.

These official statistics are incomplete or sketchy. The Austrian statistics bureau ("Statistics Austria") has attempted recently to address this problem. By combining the indicators "country of birth" and "citizenship", it was finally possible to arrive at an accurate total of people with immigrant backgrounds since the national census in 2001. A person's citizenship does not necessarily indicate whether he is an immigrant. On the one hand there are children of immigrants who were born and raised in Austria, who are not technically immigrants. On the other hand, people born in a different country who have received Austrian citizenship should be counted as immigrants.

New Statistics Austria calculations put the total immigrant population in Austria (foreign-born residents + people with an immigrant background) at 16% of the population, or 1.353 million individuals (according to the date 01.01.2007).

“Immigrant background” is defined as people who were born in another country and those who were born in Austria but do not have Austrian citizenship.<sup>56</sup> The percentage in Vienna, 31.4%, is nearly twice as high (Statistik Austria 2007).

Statistics Austria will provide the relevant data regularly in the future. Starting this year, the Austrian microcensus will include parents’ country of birth in determining immigrant status – the first results are expected in summer 2008.

Statistics Austria’s process of determining “persons of immigrant background” is well under way and continually being developed and standardised – this is an important step.

Studies should adopt Statistics Austria’s definition as the new standard if possible for purposes of comparison, as the previous lack of a standard definition of “people of immigrant background” has meant that individual studies or projects have been based on completely different operational processes definitions. Three examples illustrate this: The study on “Ethnic Economies” mentioned previously chose to define “businesspeople with an immigrant background” as “business owners of a nationality other than Austrian at the time they founded their business *and* people on the Vienna Chamber of Commerce list with Austrian citizenship whose first and last names are ‘very likely’ to belong to a non-Austrian culture” (Enzenhofer et al. 2007).

An employment agency (AMS) pilot project for teenagers concluded that over 60% of AMS teen clients had an “immigrant background” (defined as “teens who were born in a foreign country *and/or* whose everyday language at home is not German”; see Heckl et al. 2007)). An analysis of “university students with immigration backgrounds” concluded that 27% of all students in Austria have an “immigration background” (the working definition here was “the person was born in a foreign country *or* at least one of his/her parents was born in a foreign country”; see Unger/Wroblewski 2007)).

Future demographic developments may indicate the need to redefine or further differentiate the term “immigrant” for statistical purposes yet again.

## **The Basic Structure of the Vienna Area Concept of a Target Group Monitoring**

### *1. Gathering and processing / systematising available objective indicators*

First of all, the official statistics available on foreigners’ education, employment and unemployment as well as immigrants as business owners in Vienna should be systematically documented and presented in order to produce a clear picture of the situation and its developments. As a reference, the statistics should be compared with the Viennese population with Austrian citizenship.

### *2. Desirable objective indicators*

In addition, indicators requested or mentioned by those involved (e.g., immigrants’ levels of qualification, or a structured documentation of their working histories) should be defined and the feasibility of calculating them checked.

### *3. Indicators on the basis of current pilot studies in the Vienna area*

In addition to a secondary processing of the official statistics, the results of current pilot studies (available for the first time) dealing with “people in Vienna with an immigrant

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<sup>56</sup> The group defined as „people with an immigrant background“ in Austria can be further differentiated: there are those of “primary immigration background” (foreign citizens born in a foreign country, 52%), “secondary immigration background” (people born in Austria who do not have Austrian citizenship, 9%) and “tertiary immigration background” (Austrian citizens who were born in another country, 39%).

background” with respect to labour market-relevant phenomena (business owners with an immigrant background, teenagers with an immigrant background in the Vienna job market) should be documented as indicators.

#### *4. Subjective Indicators*

Another element of a regional concept for Vienna that is being considered is complementing the objective labour market statistics with subjective perceptions and assessments (from the point of view of immigrants and business owners) of the market situation and the problems it poses for immigrants.

A standardised empirical data-gathering tool could be developed within the scope of the current project, to analyse the problems immigrants feel they face in trying to become integrated into the job market; an analytical tool to assess the issues companies in Vienna that employ many foreigners grapple with could also be developed.

Such an analysis would be an innovation for the Vienna area and could be useful in implementing and analysing integration efforts in the job market if followed up by monitoring.

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## The Implementation of a Regional Labour Market Monitoring Concept from the Perspective of Learning Theory

*Jenny Kipper*

### Introduction

In the following a number of learning theory based considerations will be sketched on how a project developed internationally can best be continued on a regional level and which factors are essential for its successful implementation. As an example, the second part of the article will briefly take up the project "Entwicklung eines Zielgruppenmonitorings zur Unterstützung der Integration von Migrantinnen und Migranten in Beschäftigung durch gegenseitiges Lernen im Rahmen des Europäischen Netzwerks zur Förderung des Regionalen Arbeitsmarktmonitorings".<sup>57</sup> After that, focus will turn to regional and cooperative implementation of monitoring initiatives. The latter is interesting from two perspectives: the learning by the project partners from each other, and the learning of regional actors<sup>58</sup> from and with the project.

The following questions are relevant: What, from the perspective of learning theory, must be taken into consideration by various participating actors (e.g. project management, project team, regional institutions, and migrants)? How to ensure the integration of all actors? Can the implementation of a project be seen as a learning process of all actors? Does the implementation represent an organisational learning process? Is it possible to achieve sustainable learning effects in the form of quality management of processes and communication?

### Learning

Learning as such is understood as alteration of behaviour, that is, as the development and alteration of behaviour, or as acquisition of knowledge (c.f. Steiner 2001).

The fundamental function of learning is to react to current and continuously changing events in the environment through multifaceted processes of orientation and assimilation, and doing so stably and adaptively (c. f. Gold 2003)<sup>59</sup>. In the example to be discussed, "events in the environment" are the rising number of unemployed migrants and their lack of integration into the regional labour markets. Consequently, regional actors must react to these circumstances. One possible reaction is to work with new integration methods in the form of a project, such as what happened in the example given here.

Transfer of learning is achieved by applying what has been learned to new situations. In this case, it means transferring work practice to new contexts, through:

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<sup>57</sup> Details of the project are discussed by Bittner and Mathejczyk in this book.

<sup>58</sup> „Als regionale Akteure sind die Personen und Institutionen zu verstehen, deren Aufgabe es ist, die Zielgruppe (Migrantinnen und Migranten) in den Arbeitsmarkt zu integrieren“ (Mathejczyk, 2008, 12).

<sup>59</sup> „Die grundlegende Funktion des Lernens besteht darin, durch vielfältige Orientierungs- und Anpassungsprozesse dauerhaft und adaptiv auf aktuelle, sich stetig ändernde Umweltereignisse zu reagieren“ (Gold 2003, 99).

1. similarity between the elements (only when the new tasks exhibit the same elements as ones learnt can the transference take place).
2. application of general principles (known mechanisms are transferred to new tasks),
3. meta-cognitive controls (transference is arrived through planning, monitoring, and regulation of information processing).

Interesting for analysing the projects are the so-called new learning forms. These are based on the assumption that the core pedagogical task have shifted, to the extent that expert instructions alone are not sufficient and the creation of adequate learning opportunities must be given a priority. Instead of assuming that learning through a process controlled by pedagogical experts is in principle possible and can produce expected success, learning is understood as a complex process of modifying thought and behaviour patterns. This process can be stimulated and moderated from the outside, but in terms of what is and is not actually learnt, it is steered by the learner herself. This [point of view] has the effect of fundamentally shifting the emphasis of pedagogical planning and the effort to transmit knowledge (c. f. Dollhausen 2006)<sup>60</sup>.

A learning form as such describes a methodological didactic approach and its implementation in various contexts.

The following learning forms are important for the context described here: problem oriented and problem-based learning, cooperative and collaborative learning, and intercultural learning.

The next part of this article gives a quick report on the already completed EU-project, and discusses as examples a number of learning-theoretical aspects of it.

### **Summary of the EU Project**

Four European regions took part in a transnational team for the EU-Project. This meant that there were intra-regional learning processes within each of the regional teams as well as inter-regional learning processes among the regions within the project team.

Throughout the project there was cooperative learning through discussions among the learning agents. This is the means by which the project team expected to attain advantages in terms of the quality of knowledge accrual and the development cooperative and communicative skills and in terms of motivation for learning (c. f. Gold 2003)<sup>61</sup>. These areas were strengthened in the project through contact with different perspectives and the necessity to represent one's own point of view. This was very important for the EU project because of the need to bring together the perspectives and experiences from the four different regions and to make them usable for one single concept.

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<sup>60</sup> „Statt davon auszugehen, dass das Lernen in einem durch pädagogische Experten gesteuerten Prozess grundsätzlich möglich ist und erwartbare Erfolge erzielen kann, wird das Lernen als ein komplexer Vorgang der Veränderung von Denk- und Verhaltensmustern betrachtet. Der kann zwar von außen angeregt und moderiert werden, doch wird er in Hinsicht auf das, was tatsächlich gelernt wird und was nicht, durch die Lernenden selbst gesteuert. Damit verändern sich die Schwerpunkte der pädagogischen Planung und Vermittlungsarbeit grundlegend“ (Dollhausen 2006, 7).

<sup>61</sup> „Vorteile im Hinblick auf die Qualität des Wissensaufbaus, die Entwicklung der kooperativen und kommunikativen Fertigkeiten und hinsichtlich der Lernmotivation“ (Gold 2003, 107).

Moreover, every “learner” was responsible for its own contribution to the project while dependent on everyone else at the same time. This had a positive effect both on the way the project ran and on its result. In addition, this mechanism of cooperative learning has a quality control effect, because participants examine and evaluate the progress and results of each other. Consequently, cooperative learning can also be understood as a kind of quality control.

### The Prospect of Regional Implementation

Regional implementation of the monitoring concept will take place in a region of Hesse in a follow-up project. Participant will include both the project team as well as those regional actors who are interested in a successful implementation and stand to profit from the creation of a target group specific information base (c. f. Mathejczyk 2008)<sup>62</sup> in their daily work. The question of how regional actors can contribute to the success of implementation with their specific knowledge has already been accurately defined (c.f. Mathejczyk 2008).

The following learning forms can be integrated and made use of in the project:

- Problem-oriented and problem-based learning, that is, learning aimed at solving problems. Problem oriented learning is not strictly speaking a learning method. It is rather a general approach that connects supervised but self-directed learning, as far as possible, with realistic problems (c. f. [www.erwachsenenbildung.ag/fachthemen/lernformen/weotere\\_lernformen.php](http://www.erwachsenenbildung.ag/fachthemen/lernformen/weotere_lernformen.php))<sup>63</sup>.
- Cooperative and collaborative learning, that is, learning with others. Modern settings for learning are not (only) based on the transmission of knowledge from a teaching person to a learner; they make use of the knowledge of all participants. This requires appropriate knowledge management. While several learners work together on a task, the teacher takes the role of a counsellor. The goal is more active engagement with the substance, a more even distribution of activities, as well as critical examination of issues on the basis of various points of view (c. f. [www.erwachsenenbildung.ag/fachthemen/lernformen/weotere\\_lernformen.php](http://www.erwachsenenbildung.ag/fachthemen/lernformen/weotere_lernformen.php))<sup>64</sup>.
- Intercultural learning, that is, learning with people from various cultures. Private and career related mobility has risen in the last decades. People come increasing in contact with each other and must adjust their behaviour to adapt to this reality.

In the following only the aspect of cooperative and collaborative learning will be discussed further:

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<sup>62</sup> „Schaffung einer zielgruppenspezifischen Informationsbasis“ (Mathejczyk 2008, 16).

<sup>63</sup> „Problemorientiertes Lernen ist keine Lernmethode im engeren Sinn, sondern ein allgemeiner Ansatz, der betreutes, selbstgesteuertes Lernen an möglichst realitätsnahe Probleme koppelt“ ([www.erwachsenenbildung.ag/fachthemen/lernformen/weotere\\_lernformen.php](http://www.erwachsenenbildung.ag/fachthemen/lernformen/weotere_lernformen.php)).

<sup>64</sup> „Moderne Lernsettings basieren nicht (nur) auf der Vermittlung des Wissens von einer Lehrperson zu Lernenden, sondern nützen das Wissen aller beteiligten Personen. Dies erfordert ein geeignetes Wissensmanagement. Mehrere Lernende arbeiten gemeinsam an einer Aufgabe, die Lehrperson nimmt eine beratende Funktion ein. Das Ziel liegt in der aktiveren Beschäftigung mit dem Inhalt, einer gleichmäßigeren Verteilung der Aktivitäten sowie einer kritischeren Auseinandersetzung mit dem Inhalt auf Grund der verschiedenen Sichtweisen“ ([www.erwachsenenbildung.ag/fachthemen/lernformen/weotere\\_lernformen.php](http://www.erwachsenenbildung.ag/fachthemen/lernformen/weotere_lernformen.php)).



Whenever there are cooperative goal-structures, self-responsibility and individual accountability for one's own learning activity will be strengthened (c. f. Gold 2003)<sup>65</sup>. It could follow from that that the participants exert themselves more because they recognize more clearly their own benefit from the project.

The project team should therefore have a steering-function, and therefore a more passive role in the project progresses. The active role belongs to the actors, who on their part need to supply information from the experience with their work, in order that these experiences can be tied together and processed in the project.

The following conditions are conducive to cooperative learning according to Gold (2003): 1. incentive structures, 2. selection of learning tasks, and 3. the formulation of learning goals.

All these conditions are present in the project: 1. an improved working practice served as incentive structure; 2. as the participants cooperative voluntarily, they have selected the learning tasks themselves, and 3. they took part in the formulation of the goals and tasks in the run-up to the project planning.

The following criteria need to be considered while implementing the project:

- Connecting work to learning,
- Recognition of the participants,
- Establishment of 'time sovereignty',
- Certificates as record of learning progress,
- Engaging the participants in the planning, execution, and evaluation of courses and programmes (c. f. Dollhausen 2006)<sup>66</sup>.

In the context of the project, connection of work with learning occurs through the daily use and the scrutiny of the compatibility of the concept with daily work. Regional actors receive recognition by being declared as experts in their fields and being given the authority to take part in shaping the course of implementation. 'Time-sovereignty' must be guaranteed by the project team. In other words, deadlines must be made public in a timely manner while a time management must ensure that all participants are able to accomplish the project in a timeframe that is practical for everyone. Interim reports and results of the project can serve the purpose of certificates, and they ought to be made available to all participants, so that there is sufficient transparency. Finally, Dollhausen mentions the engagement of participants in the project planning. This can be compared with participant orientation familiar to courses in continuing education. Under this participative aspect the project team need to bear the following points in mind already at the project planning stage:

- the project planning should include and integrate the regional actors and their expectations,
- the interest of actors should be sampled regularly and taken into consideration both in the preparation stage of the project and during its implementation,

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<sup>65</sup> „Wenn kooperative Zielstrukturen vorliegen, wird die Selbstverantwortung und die individuelle Verantwortlichkeit für das eigene Lernen gefördert“ (Gold 2003, 108).

<sup>66</sup> Verbindung von Arbeit und Lernen, Anerkennung der Teilnehmenden, Herstellung von Zeitsouveränität, Zertifikate als Belege für Lernfortschritte, Partizipation der Teilnehmenden an der Planung, Durchführung und Auswertung von Kursen und Programmen (vgl. Dollhausen 2006).

- the actors should be integrated into the execution of the project and each should have a part in shaping its course based on their own interests,
- consultation should be available for actors on questions of substance and methodology,
- an evaluation of the project should bring about transparency,
- transparency of procedure and progress of the project should be available to the actors at anytime,
- the actors should be given necessary space-and technical-related infrastructure for participation,
- in the interest of transparency, those in charge of the project should clearly define and make known the goals of the project, various roles, and responsibilities; in addition, they should appoint contact persons,
- the institutions of the actors and their direct superiors should value the project and stand behind the project management. For their part, the project management team should reciprocate with transparency,
- the resources of various actors and the management team should be clarified from early on,
- the organisational structures of the regional institutions should be respected, as values and norms of the actors are reflected in them.

Some possible forms of communication between the project team and the regional actors are:

- personal conversation,
- consultation among colleagues,
- workshops for participants,
- provision of supervision and counselling for practice,
- professional talks,
- targeted continuing education and training,
- enabling the support for independent concept developments (c. f. Dollhausen 2006)<sup>67</sup>.

Conflicts and irritations should be understood as part of the process and not be made taboo-topics. It should be possible to accompany both these as well as potential alterations of process in the institutions of regional actors, which could develop through the project work and its outcome, with communication processes.

Equally conducive for the success of the project is the constant feedback about the objectives of the project during the progress from the actors. This helps to evaluate whether the project is progressing in the right direction. Such feedback-loops should also be started among the actors, so that they understand the needs of each other.

Through constant feedback, sustainable learning effects in the form of quality management of processes and communication can be achieved, which are necessary for ensuring the long-term impact of the project.

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<sup>67</sup> „persönliche Gespräche, kollegiale Beratung, Mitarbeiterworkshops, Bereitstellung von Supervision und Praxisberatungen, Fachvorträge, gezielte Fortbildungen, Ermöglichung von Förderung eigenständiger konzeptioneller Entwicklungen (vgl. Dollhausen 2006).

## Outlook

From learning theoretical perspective all different actors can be integrated into the project. With the means mentioned above a sufficient integration of regional actors can be ensured and the role of the project team can be clearly defined. Through constant feedback and the establishment of feedback-loops the project implementation can be understood as a learning process for all participants, a process that can even lead to organisational change in the respective institutions of the regional actors. Feedback-loops are equally instrumental for the quality management of project implementation and of its outcomes. In order to make use this experience for following projects, it would be conceivable to introduce an evaluation of the communication structures

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## **II. Requirements for the Application of Conceptual Elements on other Target Groups**

### **Introduction**

The approaches to target group monitoring laid out up to now are based on the conceptual elements of the regional labour market monitoring. Now, these approaches are examined from another perspective. This moves in the direction of determining the requirements for applying them to other relevant target groups in the labour market. These can be socio-culturally defined target groups such as young or older employees or the unemployed. On the other side, these can be defined based on qualification levels such as low-skilled, semi-skilled or skilled workers and whether they are currently employed or not. The first set of target groups would be more similar structurally to the migrant target group focused on in Chapter 1 than the second group.

This treatment of transference to other target groups is conducted in the context of the conceptual elements of the regional labour market monitoring; specifically: Information, Communication and Action. The following contributions show that information for the representation of the various target groups contains common thematic areas for the employed and the unemployed. The concrete differentiation within the thematic areas shows clear distinctions between the target groups. Furthermore, there are thematic areas unique to a single target group. To communicate information to users, various media were used, ranging from workshops to printed reports to web sites. Interesting is the development of the Action element. There were strategies for the networking and sensitising of regional actors as well as organising for the implementation of regional programmes, for example in regard to the target group of older workers.

### **2.1 Target Group Monitoring related to Older and Young Employees and Unemployed**

#### **Introduction**

Older and younger employees and the unemployed are frequently in the focus of labour market politics. The central interest in older employees is to ensure their longest possible retention in the workplace or, in the case of the unemployed, to integrate them into employment. Dieter Schulze, Christina Stecker and Riccardo Romano show in their contributions that a target group monitoring can be differently applied. Dieter Schulze presents the example of a German community where the target group monitoring approach accompanied a community agreement to increase the labour market participation of older unemployed. Christina Stecker, as a representative of the German pension insurance, focuses strongly on the retention of older workers in the labour force and the necessary sensitizing of German companies to this issue. In the third contribution, Riccardo Romano defines what information is necessary to advise regional politicians in Italy. Italy is characterised by a significantly lower employment rate among older employees than other Western European countries. The users of the monitoring information are extremely diverse. With respect to the thematic areas where information should be made available, there is a consensus that the employment possibilities and situation for older employees should be documented. Beyond this, the three authors suggest consideration of topics such as health status and mobility or flexibility. This is necessary due to the simple fact that this information is critical for the employability of older workers. Dieter Schulze illustrates the situation by recommending the use of various qualitative data alongside quantitative data. The communication of monitoring information

and the actions directly resulting from it are nearly identical in the descriptions of Schulze and Stecker. In the case of the community agreement described by Dieter Schulze, the users and their derived regional activities are clearly determined. Christina Stecker praises consulting companies to achieve a more sensitive handling of this age group. Here as well there is a direct connection between the target group and their handling.

Young individuals are relevant as a target group for labour market politics, especially at the moment of transition from school to job. This is the argument of Bernard Hillau and Yvette Grelet. In addition to the central importance of both employment and unemployment they assert that further thematic areas, such as leaving school, cannot be omitted in a target group monitoring focusing on youth. With the example of the Provence-Alpes-Cotes d'Azur region in France they address the issue of the usefulness of available data sources. As users of their data they consider political actors who make decisions and institute measures on the basis of this information. The communicating of the information occurs through reports.

In the descriptions of the two target groups, older and young employees and unemployed, it becomes clear that the target group monitoring concept that was developed for migrants (see 1.3) can largely be directly transferred to these other socio-culturally defined target groups.

## Usage of Target Group Monitoring in the Process of Implementing a Regional Pact for a Better Labour Market Participation of Older Employees

*Dieter Schulze*

In the Ennepe-Ruhr district in Germany, there was a local pact agreed on which should help to improve the labour market participation and integration of older employees<sup>68</sup>. A special focus was set on the integration of longterm-unemployed older employees. The target group of older employees was defined as persons aged between 50 and 60 years. In the case of the unemployed, there were two groups distinguished. Short term unemployed (up to 12 months) and secondly, long term unemployed (more than 12 months out of work).

The concept of target group monitoring was applied to support the implementation of this pact. In a first step the information generated with the monitoring approach was used to provide transparency on the labour market situation of older employees and unemployed in the Ennepe-Ruhr-District. This transparency helped to develop strategies and after their implementation to measure the results gained with it. During the first pact from 2005 to 2007 we placed, instead of 200 planned integrations, a total of 395 people into employment. The enlarged pact has achieved up to now more than 800 instances of labour market integration. This number has put it among the top German pacts since January 2008.

The indicators used in the target group monitoring for older employees and unemployed are partially the same as for the target group migrants. However, to some extent there are different indicators necessary to get an adequate picture of the labour market situation of older employees and unemployed. All indicators are sorted by three age groups. These are 50-55 years old, 56-60 years old and the third group of more than 60 years. These age patterns were used because experiences of many years showed that the chance of participation or integration vary very much in the three age groups.

The topic of employment has to be covered with indicators. Therefore, the following were to be taken into account:

- Number of employees sorted by gender and nationality
- Number of employees sorted by industrial sectors
- Trends of employment over time sorted by groups of industrial sectors

Although of strong interest was the situation of older unemployed persons. This was covered with the following indicators:

- Number of unemployed sorted by gender and nationality
- Rate of unemployed over time sorted by gender and nationality
- Number of unemployed sorted by geographic distribution (fine distinction inside the region)

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<sup>68</sup> See [www.joboffensive50plus.de](http://www.joboffensive50plus.de)

A third topic of interest was enterprises. The focus was however not only set on the business owners. Moreover it was considered to have an idea about to what extent there are enterprises in the district which employ older people. The following indicators were specified:

- Number and size of enterprises employing 'older' staff
- Number of enterprises owned or operated by managers older than 50 years

The topic of jobstarters which was of high relevance for the target group migrants had not to be covered here.

The theme of integration initiatives is of importance because for a long time concerning intergration support there was very much a focus on target groups like migrants, women, single parent or young people. Only lately there are more and more measures available which are targeted on older persons, especially older unemployed. The following indicators were specified:

- Number of measures for older employees and unemployed sorted by gender and nationality
- Type of measures for older employees and unemployed sorted by gender and nationality

Aside from the topics covered by the target group migrants other topics should be covered additionally. This is firstly, the state of health which is rather crucial for the employability of older persons. There is no quantitative data available to measure it adequately. It requires more qualitative information. The second important aspect is the flexibility and mobility of older people. This includes as well the mental and physical dimension as also the spatial mobility. Although here, there is rather qualitative data necessary. As known the demographic change will cause changes in the type of job arrangements, in the needs for qualification and in the opening of new jobs. Based on this idea, there are indicators relevant which monitor the changes of work- and qualification environments in the short-, mid- and longterm perspective.

Concluding, it can be stated that the information generated in the framework of target group monitoring for older employees and unemployed was and is still extremely helpful in implementing and further processing our regional pact for the improvement of the labour market integration of older persons.

## **A Perspective on Ageing Labour Forces in SMEs – Conclusions from the Projects “Smart Region” and “GeniAL”**

*Christina Stecker*

### *Summary*

*The social structure, the economy and the labour markets of Europe will be significantly influenced by demographic change, thus characterised by a significant ageing of the labour force potential. A number of questions arise concerning the alternatives to the prevalent practice of early retirement, the possibilities for companies to remain productive and competitive with older and ageing workforces, and to the measures which can contribute to employees maintaining their health, their ability and their motivation to work longer. In the following article the major challenges of ageing labour forces are described first (Chapter 1). It will be argued, that there are possibilities and policy options for meeting these challenges on a small scale regional and a small sized business level, taking the trans-national project Smart Region and the follow-up project “GeniAL” as examples (Chapter 2). These experiences demonstrate the necessity and usefulness of regional (target group) monitoring. To help adjusting to the future developments sustainability and the strategic use of organisational infrastructure are the key preconditions (Chapter 3).*

### **1. Demography and Ageing Labour Forces in Europe**

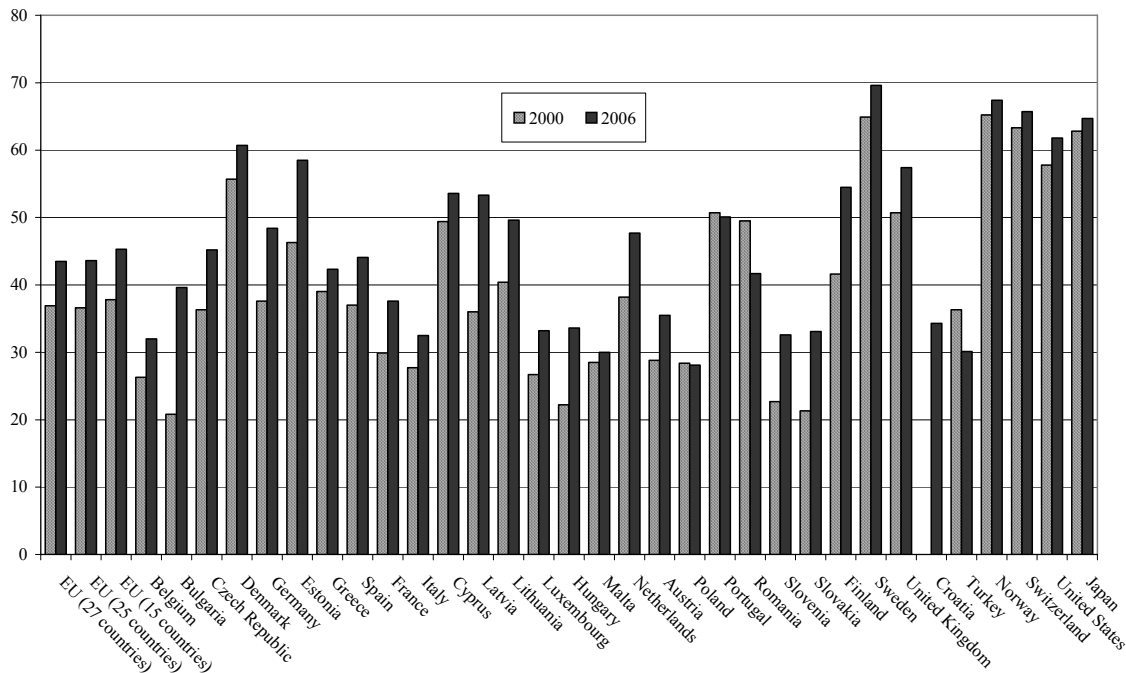
The past 50 years have seen major improvements in human life expectancies, basic hygiene, vaccinations against many communicable diseases, and lower rates of infant mortality. In the coming five decades, the size and age-profile of Europe's population will change substantially. The post-war baby-boom generation reaches retirement age, fertility rates have remained well below the natural replacement rate since the 1970s and life expectancy at birth, having risen by 8 years since 1960, is projected to rise by a further 6 years until 2050. However, all three factors combine to pose significant economic, budgetary and social challenges over the coming decades. Because of the rapid growth of the elderly population, migration to Europe can only partially offset these trends. The total population of the EU-25 is projected to fall relatively slightly from 457 to 454 million between 2004 and 2050 (Commission of the European Communities 2006: 7, 32f; Commission of the European Communities 2002: 7; Commission of the European Communities 2003a). By contrast, the so-called “demographic risk” is used by governments to add extra costs to pension systems or for painful adjustments to social-security, medical-care systems or active labour market policies.

It is undisputed that Europe's workforce is getting older and that this change process sets new challenges for employees, companies, the labour market and policy-makers. Against this background the relatively high unemployment rates and the relatively low labour force participation rates of older people (in relation to unemployed persons and participation rates of the less than 55 year olds) are a huge challenge. In the past early exit was often seen as way to solve the problems of the labour market. The problems associated with that only partly led to a reversal of the early exit policy. Reform attempts to extend the working time over the life-course, however, partially fail because of the still usual practice of early retirement – namely the benefit systems which allow unemployment before pension can be claimed as well as other options (see Stecker 2005, Warwick Institute for Employment Research 2006: 57, Stecker et al. 2007).



The impact of an ageing population is mapped by projections of the labour force. The total number of persons employed is projected to increase up to 2017, but after 2017, the demographic effects of an ageing population outweigh this effect. After increasing by approximately 20 million between 2004 and 2017, employment will contract by almost 30 million by 2050. This means a fall of nearly 10 million. During the period between 2017 and 2030, the working-age population will start to decline as the baby-boom generation slowly enters retirement. The ageing effect will dominate as of 2018, and both the size of the working-age population and the number of persons employed will be on a downward trajectory (Commission of the European Communities 2006: 44). The overall employment rate is predicted to rise from 63% in 2003 to 67% in 2010 and to 70% in 2020. The increase in the employment rate of older workers is projected to rise from 40% in 2004 to 59% in 2025. Rising employment rates will offset the decline in the working-age population between 2012 and 2017 (Commission of the European Communities 2006: 40). As can be seen in Figure 1, in most of the European Countries, Japan and the United States the employment rate of older workers aged between 55 and 64 years improved from 2000 to 2006.

Figure 1: Total Employment Rate as percentage of older Workers in European Countries, Japan and the United States, 2000 and 2006

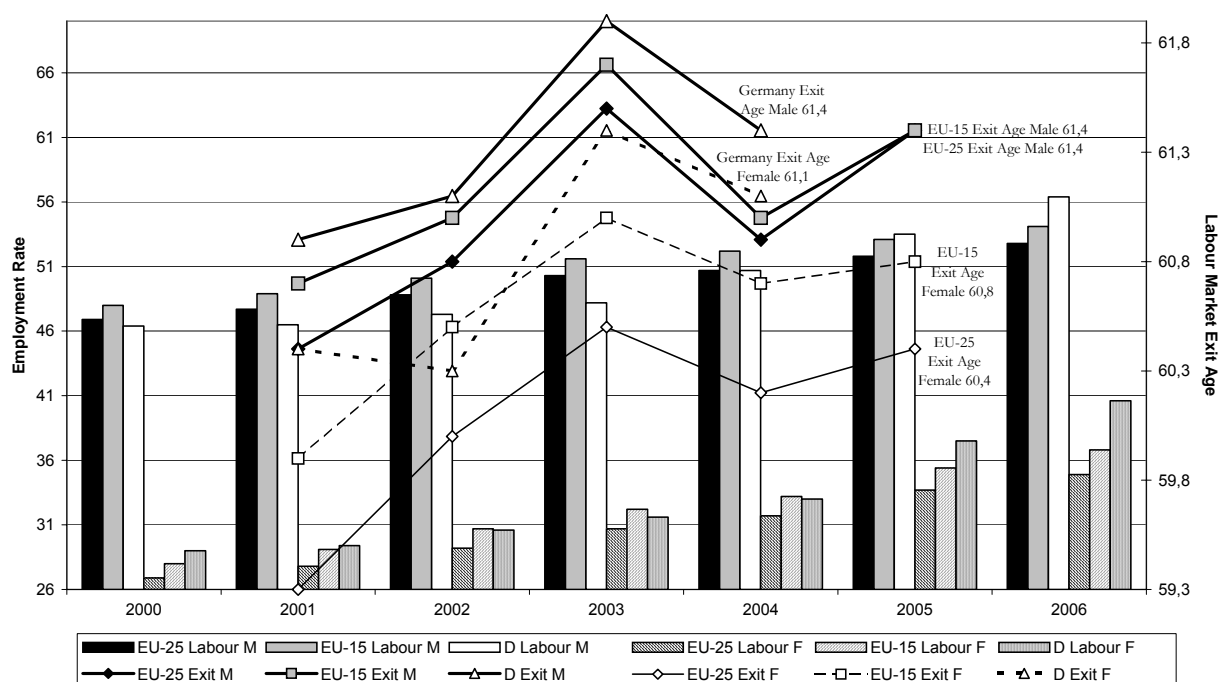


Source: Own graph, Database: Eurostat.

However, in many cases, reforms fall short of what is required to achieve the targets set by the European Union (Stockholm, Barcelona and Lisbon Summits) for the employment rate of older workers and for an increase in the effective retirement age by five years up to 2010. Currently, most Europeans leave the labour market before reaching the statutory retirement age of 65 (see Deutsche Rentenversicherung Bund 2008 on basis of Eurostat data). According to the mentioned projections, the 50% Lisbon employment target for older workers would be reached by 2013, the overall employment will reach the targeted 70% just in 2020, and only the 60% Lisbon employment rate target for females will be reached in 2010. The projected increase of the female employment rates, which will rise from 55% in 2004 to almost 65% by 2025, is due to the fact that older women with low employment rates retire and are gradually replaced by younger women (Commission of the European

Communities 2006: 40f). The employment rates of older male and female workers as well as the labour market exit age by gender is outlined below (Figure 2) for the “old” EU-15 countries, the enlarged EU-25 and Germany in the time period between 2000 and 2006.

Figure 2: Total Employment Rate of older Workers and Labour Market Exit Age in the EU-15, EU-25 and Germany, 2000-2006



Source: Own graph, Database: Eurostat.

It is expected that, by the year 2050, Europeans will live at least five to six years longer than today. An increase of 5-6 years will raise the cost of providing the same pension level by 25 to 30 percent. Projections of public pension expenditure, which already foresee continued employment growth beyond 2010, still are predicting increasing public pension expenditures. Measured as a percentage of GDP these expenditures will be reduced only by one third in 2050, compared to the baseline scenario of unchanged policies. This means that higher employment rates alone will not solve the problem of the financial sustainability of pension systems. Together with the other major change that stems from the fact that the large baby-boom-cohorts will reach retirement age and subsequent cohorts are much smaller as a result of lower birth rates. This can be seen from Europe's population pyramid where people between 35 and 55 are currently very numerous. In the coming 10 to 15 years these large cohorts will start retiring and drawing their pensions (for further details see Commission of the European Communities 2003a).

An obvious policy response to increased life expectancy would be to raise the retirement age so that the balance between time spent working and time spent in retirement remains unchanged. The increasing trend towards the tightening of the entrance requirements and the accentuation of the personal responsibility (see Stecker 2004) brings another aspect to the surface, individual social welfare and the maintaining or restoration of the direct responsibility would be dependent of the overall medical-technical progress. Within ageing populations prevention and rehabilitation are thus of great importance. According to findings of gerontology and ageing investigation the ability to solve familiar cognitive problems (intellectual capability) only insignificantly goes back (however, less applies to the material

competences). For the solution of familiar strategies in higher ages – next to health – the thinking and learning-strategies developed during the life-course as well as the gained knowledge are the substantial factors. To capture the future necessity to participate in the society to an advanced age and remain working, the permanent extension of knowledge and skills are of great importance (Bundestagsdrucksache 14/8800 2002: 85-87, European Foundation for the Improvement of Working and Living Conditions 2008: 49ff). In addition to extend the employability the willingness and ability to do so is accompanied by a close cooperation at the company level – the responsible body in shaping working conditions in a way that learning is possible (Buck/Kistler/Mendius 2002) as well as a lot of other terms. In the following the Smart Region project will be introduced, where innovative measures for successfully handling the future dual ageing process – smaller cohorts at the lower end of the age pyramid as well as larger age groups at its upper end – are being developed.

## **2. Succeed with Small Scale Regional Monitoring: The EU-Project Smart Region**

The demographic and labour market political conditions are very different especially on the federal, country and municipality level. The local actors are in case of doubt better informed of what is functioning, necessary and also removable in their rural districts and municipalities. Overall solutions and approaches on national state level do not appear therefore helpful and/or only little suitable, to counter the challenges of an ageing population and the present problematic of employment (Kistler 2005).

Innovative approaches to successfully deal with the future challenges are being developed in the EU-Project “Smart Region – Age management in innovative regions”<sup>69</sup> within the framework of Article 6 of the European Social Fund - ESF. One of the programme priorities in the funding period 2004-2006 – embedded in the general aim of ESF-Article-6 to support innovative measures in the field of employment policy – was the support of innovative approaches to the management of demographic change. In the EU project Smart Region, under general co-ordination by the Federal German Pension Insurance (Deutsche Rentenversicherung Bund, DRV Bund), partners from Austria, Germany and Portugal worked together on the development of new solutions. The sensitisation of the political, company and social actors for the topic was a vital point for a sustainable awareness-raising on age and age-related working. In addition, regional lasting and innovative concepts had to be developed under consideration of the gained experiences and regional special features EU-wide as “best-practices”, which might be portable in turn.

The main objective was not only restricted to current older workers but about the promotion of active ageing for all age groups. This was a logical conclusion of interdisciplinary knowledge on the effects of demographic change (see Chapter 1) as well as the fact, that especially the baby-boom-cohorts currently belong to the below 50plus clientel. In combination with legal instruments to extend working lives the target is set for a larger proportion of the 55-64 year-olds to remain in work as well as the ability for the much larger proportion of employees who are now between the ages of 35-55 to work longer. Therefore measures focused on older workers as well as on healthy ageing. In this sense, the project responds to the European Commission’s aim of creating “more and better jobs” (Commission of the European Communities 2003b; Taskforce Beschäftigung 2003, Warwick Institute for Employment Research 2006). A new and vital point of departure lied in the (small scale) regional approach: good practice cannot be simply

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<sup>69</sup> Further information on the project, the involved regions and European countries as well as age management tools are provided in German and English on the internet, see [www.smartregion.net](http://www.smartregion.net).

transferred from one company or one region to another without looking at the prevailing premises and framework conditions. The Smart Region activities related to the small scale regional and company level are listed below (see Table 1).

Table 1: Smart Region activities and results on regional and company level

Action	Result
<b>Regionale Level</b>	
Analysis, preparation and representation of relevant national and in particular regional data on demographic change	<ul style="list-style-type: none"> <li>The entrance into the regions and the sensitisation of key actors by "small scale demography" was easier to solve; strategic importance of these regional facts for company internal actors (age development of customers, patients, staff, specialists etc.).</li> </ul>
Sensitisation and qualification of regionally relevant actors on the subject	<ul style="list-style-type: none"> <li>Although the regional actors have a relative knowledge of the demographic change, they often demonstrated a lack in the active analysis of the process. Nevertheless successful was (1) a part of the actors was active concerned with that topic for a first time and (2) some actors used the project work to professionalise their commitment.</li> </ul>
Initialisation of regional networks on a lifecycle approach to work as well as adaption to existing deliberation programmes and institutions	<ul style="list-style-type: none"> <li>For the first time, the topic "demographic change" played a role for the networking process of regional actors, they had occasion to exchange their points of view and experiences. A mutual "upbringing process" had been observed.</li> </ul>
Use of existing regional pilot project activities	<ul style="list-style-type: none"> <li>Impulse to the networking of regional projects for the enlargement of the respective courses of action as well as improvement of the sustainability of these initiatives in total.</li> </ul>
<b>Company Level</b>	
Dialogue between science, deliberation and practice	<ul style="list-style-type: none"> <li>The high effect and circulation degree of Smart Region based on its interdisziplinäre direction; particularly the synthesis of the know-how in demographic research and the professional consulting in health and age questions allowed education and measure concepts as well as new method combinations. This was stressed on the final international conference as an exceptional feature for instance.</li> </ul>
Sensitisation and activation of companies and institutions	<ul style="list-style-type: none"> <li>First confrontation with the problematic nature of demographic change for many enterprises and organisations.</li> </ul>
Personal address	<ul style="list-style-type: none"> <li>In personal conversations demographic change was broken down to the firms internal situation and the process was made concrete to the companies by that.</li> </ul>

Employee questioning as a part of the participative deliberation process	<ul style="list-style-type: none"> <li>• Use of the employee questioning in pilot companies as a part of participation; presentation and discussion of the results and further consequences in practice.</li> </ul>
Expenditures and benefits	<ul style="list-style-type: none"> <li>• Explanation of the contents of age management in the involved companies; accentuation of not automatically high financial expenditures or loss of working hours.</li> </ul>
Pointing out already existing company approaches to age management	<ul style="list-style-type: none"> <li>• Stressing already achieved approaches of age management; encouragement to establish this as an indispensable part of the company internal processes and know-how and using these consistently.</li> </ul>
Particular instruments	<ul style="list-style-type: none"> <li>• Evolution of instruments and methods, usable especially by SME's.</li> </ul>
Attention for small- and very small enterprises	<ul style="list-style-type: none"> <li>• These hardly get the necessary attention discussing the problematic nature of demographic change.</li> </ul>
Participative process also in small- and very small enterprises	<ul style="list-style-type: none"> <li>• Small- and very small enterprises partly never had to do with strategic human resource management yet. Also a high ability to "selfcure" was stressed in this case.</li> </ul>
Topic for managers	<ul style="list-style-type: none"> <li>• Learning to detect the own contribution to supportive and burdening factors within the enterprise.</li> </ul>
Reflection process of the employees	<ul style="list-style-type: none"> <li>• Initiation of processes to reflect the own work ability.</li> </ul>

Source: Own description

- On a *national and regional level* the aim was awareness-raising for the topic of age related working and the effects of demographic change by information provided through publications (Papers/Internet), events, lectures and regional seminars.
- On a *regional level* systematic analyses of the regional situations in specifically selected eight European regions (Brandenburg, Thuringia, and two regions respectively in Bavaria, Styria and Portugal) were taken into account in the implementation and assessment of innovative as well as approved measures. In addition, for the sensitisation of the public authorities and the regional actors reporting in the media was important (Radio features, newspapers).
- On a *company level* several companies in the specific areas were used as case examples in which concrete measures are selected and applied. Therefore, qualitative investigations, age structure analyses and employee questioning in the companies are necessary with respect to the situation and requirement of the selected company. In order to encounter the challenges of the age related working, a broad bundle of measures is available which extends from the analysis over concept evolution up to the transfer of standards. The instruments of personnel evolution, extra occupational further education, know-how-transfer, working time organisation, health promotion and enterprise culture are to be mentioned as corner stones in this case. The instruments used for the respective company should be selected by means of results of preceding analysis and in narrow vote with the company internal actors (management and staff-representative).

One of the difficult things to solve was and still is the entrance in the areas and to firms. This occurred through industry-wide regional actors by area analysis, regional specific information in publications, events and lectures, as well as seminars. For this purpose regional conferences in all Smart Regions were held with the objective of the sensitisation of the actors with specific presentation of scientific analyses in the fields of demography, labour market and pensions. To address companies, interviews and information was especially provided, including a scenario on possibilities and purposeful strategies for healthy working, learning and ageing.

### **3. Getting the Companies: The German Pension Insurance Project GeniAL**

Companies have to deal with the ageing of their staff collectively in the next decades – if they are already conscious of the problematic nature related with that anyway (see Putzing/Wahse 2005). However, also local players and the political parties are responsible, as well as the parties engaged in labour negotiations and the single employee.

In order to encounter the challenges of demographic change successfully, continuous efforts are vital. These are in fact only then successful if they can base on lastingly designed structures and are not too conditional and overcomplex in this case. However, almost all initiatives, projects or pilot approaches face the fact that these have an ending time, with other words: they are not designed on a longer-term basis and do not have a lasting infrastructure either. The comprehensively available information and deliberation possibilities of the German Pension Insurance including the company auditors form a suitable basis which is to use for a threefold reason: first, for the continuation of the practical applications developed in Smart Region. Second, there is the advantage in Germany (differently than in many other European countries) that the German state pension offers an entrance by and also a duty to prevention and rehabilitation that can be used intensely. Rehabilitation and the avoidance of invalidity due to health restrictions or missing labour market chances are not only central tasks of the German Pension Insurance, but at the same time also strategically valuable connecting factors. Thirdly, the link to available consultings of the German Pension Insurance is the solution for the existing problematic of the company entrance all projects are confronted with, in order to be able to initiate modification measures ultimately in the firms anyway. Through this utilization of the deliberation channels in the environment of information events, audits, cases of the employee integration management or necessary rehabilitation cases parallel pro-acting offers of age and health management can be brought into the companies.

The aim of the one yearlong pilot project "GeniAL – Generation management in the world of work (Generationenmanagement im Arbeitsleben)" – started in January 2008 – is to bring age and health management in at present less open fields of action, and to align available deliberation capacities thematically on overcoming strategies of demographic transformation processes in particular. Co-financing institution of the pilot phase of GeniAL is the German New Quality of Work Initiative (Initiative Neue Qualität der Arbeit, INQA) launched by the Ministry of Work and Social Affairs in the context of the programme "Perspective 50plus". By the enlargement of the deliberation service of the Information and Deliberation places (Auskunfts- und Beratungsstellen) and/or the Rehabilitation offices (Reha-Servicestellen) of the German Pension Insurance (Deutsche Rentenversicherung, DRV) awareness raising deliberation on age appropriate management especially for small and middle-sized enterprises is offered. Because just in smaller and middle-sized enterprises demographic action approaches are hardly available these firms need professional deliberation and aid at most. Here the neutral and competent deliberation

through the German Pension Insurance can develop the broadest effect, because half of all employee's insured in the social pension insurance in Germany work in enterprises with less than 50 employees. The concrete project phases and milestones of GeniAL are listed subsequently in Table 2.

Table 2: GeniAL milestones related to different project phases

<b>1<sup>st</sup> stage: Concept development phase and practice test</b>	
<b>Milestone 1</b>	Analysis and identification of thematic interfaces with existing consultings of the DRV (rehabilitation, employee integration management, employer service, company audit service) and conception of a sensitising deliberation offer with regard to company internal measures to guide the demographic transformation processes on basis of scientific and field-tested discoveries.
<i>Milestone 2</i>	Processing of a Curriculum "Demographic change and company internal action approaches" under inclusion of available education approaches and their modification with reference to the integration into the deliberation routines.
<b>Milestone 3</b>	Education of employees and multipliers (on company internal situation analysis and methodics of age related working) in selected DRV advice centers in the Berlin-Brandenburg area. Contents are sensitisation strategies, customer (calls-) acquisition, information transfer, establishing contacts to conversion projects with concrete experiences, construction of a filtered planning data bank (Term / content / contact / product).
<i>Milestone 4</i>	Practice test for the integration of methodics of age related working into existing consultings routines, that is testing the deliberation-curriculum in advice centers, feed back rounds with the advisory departments and the consultants (workshops). Latter is supposed to guarantee: <ul style="list-style-type: none"> <li>• the identification of typical implementation difficulties and their overcoming,</li> <li>• the estimation of needed resources for implementation the deliberation,</li> <li>• an increase of the whole deliberation competence,</li> <li>• feedback on the companies internal deliberation requirement and</li> <li>• the procurement of company-economical benefit.</li> </ul>
<b>Milestone 5</b>	Acquisition of an entrance to SME's of the region as a result of the deliberation process in particular through the creation of conceptual basics for a reunion of services of the German Pension Insurance (individual tier, industrial rehabilitation, company internal conversion of workplaces for example) and continuing approaches of company internal measures.
<b>2<sup>nd</sup> Stage: Transfer phase</b>	
<b>Milestone 6</b>	Conception of usefull approaches for the transfer of products elaborated in the pilot project and the deliberation process flanking products into other areas by use for the regional structure of the German state pension.
<b>3<sup>rd</sup> Stage: Analysis phase</b>	
<b>Milestone 7</b>	Concurrent Monitoring/controlling of the deliberation and conversion process including qualitative evaluation.

Source: Own description

With the pilot project GeniAL there are potentials for an active, continuous and sustainable implementation of consultation for necessary company internal interventions and individual work ability. Further more, there are lasting structures available which can be strategically used as deliberation resources and existing company entrances. Therefore, the transfer into other regions by use of the regional structure of the German Pension Insurance is planned, to assure the continuity of the findings, consultation and analysis methods as well as the neutral deliberation of employers on age management issues. In this respect, the aim of regional target group monitoring is addressed with GeniAL in an indirect way: by changing the practice of early exit and by the sensitisation of the primary focus group of actors who has the potential to change working conditions and prevent ageism: the firms.

The growing of both, the individual and the population ageing, will have major impacts on the European labour market developments and will create challenges for employees, employers and policy-makers alike. To capture the future ability to work longer, the currently younger cohorts aged 35 to 55 years have to be addressed. In this case it can not be a question of only one sided measures for the rehabilitation of older employees, but corresponding measures must apply simultaneously for the prevention and professional qualification and further education (live-long learning) already for younger employees from 35 years onwards so that people stay in a healthy condition in their professional life as long as possible and avoid unemployment at higher ages. There is at least one insight for stressing these facts: once out of the labour market, older employees (as well as other target groups) have an unequally poor chance to get back in.

Demographic and employment developments are predicted to be supportive of the European growth potentials between 2004 and 2011. Therefore, these few years are viewed as a “window of opportunity” for pursuing structural reforms. To meet the target of the Lisbon summit on higher participation rates for older employees and raising the labour market exit age – even if not on time – will temporarily lower the challenges of demographic change.



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## Older Employees as a Target Group for Labour Politics – An Italian Perspective

*Riccardo Romano*

### Generational Ageing

The French sociologist Regis Debray, examining the increasing phenomenon in life expectancy by the contemporary population, does not hesitate to call it *longevity disaster!* Certainly, this is a sarcastic definition, but true, as the increase in population caused by increased life expectancy, is a phenomenon that should not be underestimated.

The change in the average length of life requires policy makers, administrators, social workers and researchers to review the dynamics, strategies and traditional instruments of labour policies and welfare to enable the maintenance and, if possible, the development of systems economic and social issues.

The ageing of the average life in Italy, as well in Europe, is a problem involving social, cultural and political points of view. According to former Health Minister Umberto Veronesi girls born in 2007 have many changes to overcome the century of life, while boys must settle the hypothetical threshold of 97 years! It is therefore necessary to detect as an ageing average life is not purely age phenomenon in the sense of a greater life expectancy, but have extended all stages of life: childhood adolescence, maturity and consequently adulthood.

This social phenomenon becomes very important, considering the aspect of working life. This implies a need reconsideration in terms of theories of social participation of elders in working life, as well as their social position.

As you know, the European Council of Stockholm in 2001, as part of the European Employment Strategy (EES) laid down for all Member States, reaching rates of employment of older workers to 50% by 2010.

In 2006 the European average was around 44%, in Italy, it was around 32% and statistical data did not move in the last three years. In Italy at the beginning of the twentieth century, a gradual improvement in the quality of life had effects on the population between 65 and 74 years, with an explosion from the '70s, where life expectancy now reaches to eighty years for women, slightly less for men This phenomenon, combined with low birth rate, since 1997 we have in Italy more people over 65 years than 14 years old

Italian demographic dynamics have reduced the age group of existing young workforces, while the contingent of *baby boom*, which now has 50-60 years; now, and there is a strong relationship between those who have more than 65 years and those from 20 to 64 is the highest in Europe, among the highest in the world: 29% to 2005, 31% to 2010, probably to 47% to 2030.

It seems obvious, analysing such data, we have to revise the prejudice of seeing old people an obstacle to development, generational and as a social and economic weight, not only for ethical reasons, but also from a social–economic aspect. The old concept of working life, looking forward for the retirement in now to put aside. Since the quality of life (transport, medical care and social communications) and working conditions (decrease of heavy work, better facilities, greater trade union power, new technologies) lead to the will not to abandon their jobs.

Analysing some statistical data we can note that in Italy adult unemployment has increased greatly, and paradoxically, this has happened while the government activities for decades tried to solve the problem, between reform and laws, raising the retirement age and consequently employment of elderly person.

## **The Italian Situation**

Italy also has the lowest employment rates of Europe for aged people, and in 2003, the employment rate of 55-65 years was only at 32%.

Obviously, we must analyse in detail what are the motivations that lead to the detachment from the workplace.

In fact, not always elderly people have abandoned their jobs only because attracted to by joys of retirement.

In 2006 more than 31% of workers over 55 have left their jobs involuntarily, for business crisis, dismissal, and 5 % for dissatisfaction with working conditions.

This phenomenon has to be added to the conduct of firms in recent decades: mergers of large groups and relocation, these two phenomena determine cutting jobs and, often, are older workers to pay for them.

In Italy there is a phenomenon that worsens even more the situation: the social security system is no longer able to guarantee the pension fund to those who are employed nowadays.

Indeed there is a risk in the future to have more retired people than workers, since combined with some bad choices in managing Italian Pension Fund, put at risk the fundamental right of security of pensions.

It seems obvious have started long different routes aimed to achieve the objectives of Europe, and at the present, appear in line only the Veneto, Emilia Romagna, Lombardy, the Val d'Aosta and Trentino; all the regions of central and south and islands appear in big difficulties.

## **Lifelong Learning**

The impact of population ageing is most important in Italy and in Europe, today the system of incentives to work penalises older people, only encourages young people under 25 years having neglected the professional reorganising and management training.

You do not need highly qualified research to confirm that an employee the more he studied during his period of employment, the greater will be its ability to keep their jobs.

Regarding the concept of lifelong learning, in Italy the percentage of participation, is at least mortifying.

The staff aged between 24 and 35 years has a participation rate of 36% and it will decrease proportionally increase with age increasing.

For this reason it is important to have a permanent training for professional qualification, particularly set up in a society dealing with knowledge and information, the close link between these activities and the use of the unemployment benefit and other assistance for income support: the admittance to them, according to some organisations, should be conditional to participation in the above training activities.

On field researches, it becomes evident how many companies fail to provide the necessary training to workers over 45 years old. So many middle-aged workers, particularly women and Southern workers will be excluded from training processes.

On the other hand, however, someone has even suggested to use these adult workers and trainers, so to transfer to younger generations knowledge and skills acquired during their working lives, and a proposal was made to insert these artisan in a sort of register and assign them in various training courses in schools of all levels.

Many associations have also reported on the establishment of inter-sector funds for a further development hoping on a agreement to reach their full potentiality.

I think that it is a duty inserting elder people in a target group and we must help policy makers to find how not considering old people such as dead weight to be thrown away in favour of younger workers.

Senior workers have a plus-value that no university or master programme may transmit: experience and maturity.

It's obvious that from the employer's point of view it is necessary to find the right mechanism to renew the generation of employees; through continuous training older workers would have the chance to grow up professionally and to be encouraged to get the best out of their jobs.

In the meantime the productivity will benefit and lead the way for newcomers: young workforce will take advantage, without forgetting the social advantage in delaying retirement, less social costs and more work for everyone.

### **National Government Projects**

Italian authorities are considering the phenomenon, integrating instruments of income support programmes with retraining and job programmes, with a specific part of *Workfare* (welfare to work).

An example is the PARI (Programme of Action for the reuse of disadvantaged workers) project of the Ministry of Welfare began in 2005 and completed in September 2007.

This is a programme of measures in support of redeployment of disadvantaged workers and between them is the category of over 50.

The results were so encouraging that last October started a programme PARI 2, with the involvement of Regions and since the beginning they had an allocation of 22 million Euros taken by the Fund for Employment.

The benefits of accession to the programme are tax bonuses for companies that employ workers belonging to disadvantaged groups and other monthly subsidies to employees who participate in the initiatives in the labour organised by the offices in charge.

It provided a contribution even for those who decide to pursue a self management activity.

It is necessary to continue with the policy of incentives to enter the working world older workers.

For this purpose it seems useful a part-time employment for raising the general employment rate, while the retiring at the age of 67 years would raise the rate of participation in the work of only 0.5% in 2025.

To date we are 60.30% against 76.6% in the United Kingdom, Germany 72.2%, 68% for France, all geared towards decreasing Italy included.

### **Over 55 and Migrants**

It is known that for the next 15-20 years Europe will continue to receive a great impact of immigration.

Up to today national policies of the member states are not uniform regarding measures to be taken for organising immigration and combat lawlessness.

The European Union is engaged for years in programmes for the development of a common policy on immigration, especially if linked to employment purposes, as the "Action Plan on illegal immigration" of 2004.

In Italy (but in most Member States) the public finances are not sustainable with current policies. It should be necessary for a long time for the consolidation of the budget.

Cross-examination of the data shows that the phenomenon of migration extra-European and intra-European does not involve directly older workers: both migrants than European workers are often young men as demand for manpower needs youth.

It's obvious that the phenomenon should be seen in terms of the social as a whole.

The increase in the rate of participation in employment is an effective instrument through which governments can increase their revenue and bear the costs related to ageing.

In this viewpoint we must keep well in mind the balance between keeping a job and impact of workers from abroad.

### **Closing Remarks**

The continuation in working and training beyond the age of retirement would allow a moving of jobs after retirement schemes that are asserting in Europe but not in Italy.

The Italian political union has insisted on the right to retirement and at all on the permanence in the workplace.

We must invest in radical reform in working for all life long, encouraging continuing education, removing age limits in the public and private engagements.

To stimulate economic growth and to consolidate the stability of public finances, it is therefore necessary to discourage early retirement, this strategy, together with the improvement of general health, will only improve productivity.

This is an ambitious challenge on which to invest heavily especially considering the low rates of employment of workers between 55 and 64 years registered in the last three years.

You can not hide the fact that these rates are low even for the privileges granted by the pension system generation of workers to the detriment of future generations.

When taking decisions concerning the need of active policy than will require greater attention to reading the requests and requirements of workers over 55: enhancement of their professional identity, conciliation with the family needs, quality of work and measuring the condition of skills.

It is therefore a careful analysis to achieve understanding of the elements that today impede on the labour market the participation of older workers, which must be diversified by age, gender, health status, geographic area, loads families.

Such support activities for those involved in social research is a assumption to the set up effective responses to the demands of citizens

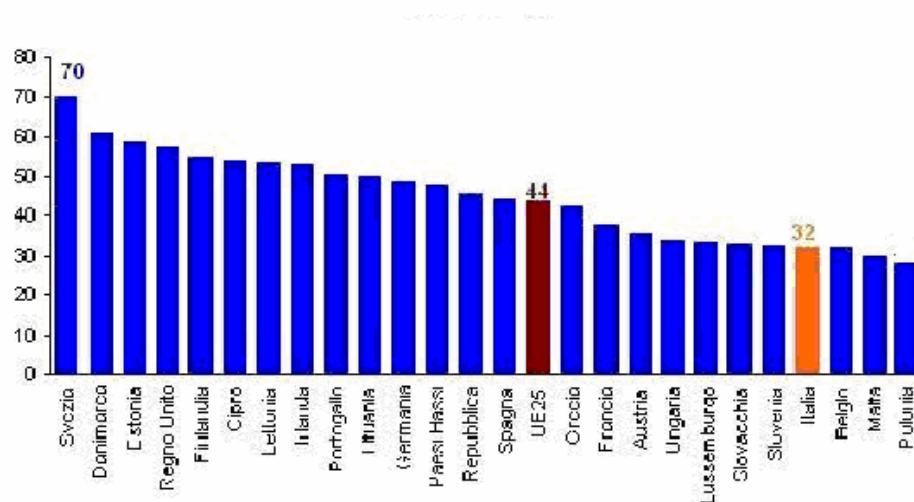
Paradoxically, the greatest beneficiaries of work persistence of older workers are the younger generation, that would have, among other things, guarantees of policies welfare.

Finally Italy will be working in the path indicated by the Community:

- Favour for demographic renewal
- Exploitation of workers with more jobs and working life more lasting
- Improved productivity and efficiency in the public and private
- Homogeneous organisation to accommodate migrants
- Adequate social protection
- Fairness between generations

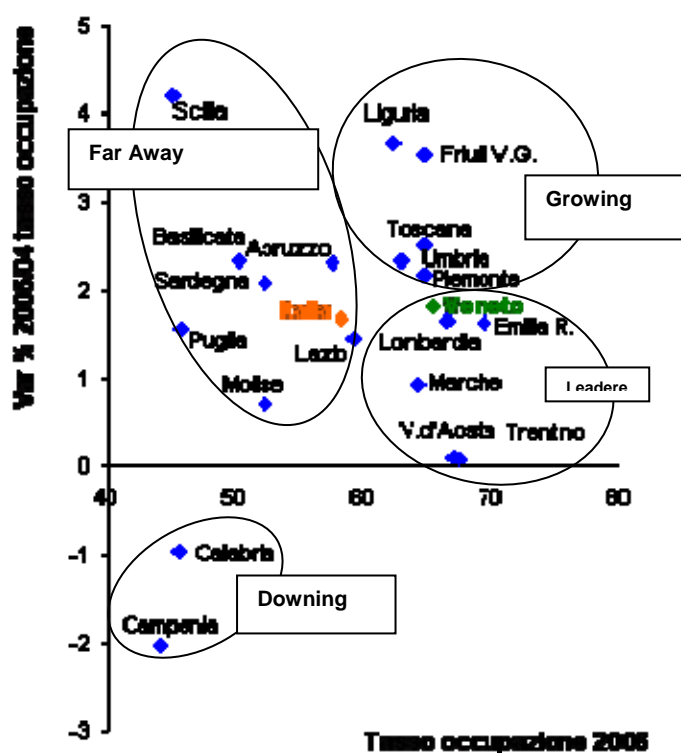
Figure 1: Employment rate workers 55-64 years old. EU Countries 2006

Employment rate workers 55-64 years old. EU Countries 2006



Source: Eurostat 2007

Figure 2: Employment rate 15-64 years old for 2006 and percentage change 2006/2004 per Region



Source: Elaboration Webresearch -on Istat data

Table 1: Employment rate 15-64 years old for 2006 and percentage change 2006/2004 per Region

	2006	2004	Var % 2006/2004
Piemonte	64,8	63,4	2,2
Valle d'Aosta	67,0	67,0	0,1
Lombardia	66,6	65,5	1,6
Trentino A.A.	67,5	67,4	0,1
Veneto	65,5	64,3	1,8
Friuli V.G.	64,8	62,5	3,5
Liguria	62,4	60,2	3,7
Emilia Rom.	69,4	68,3	1,6
Toscana	64,8	63,2	2,5
Umbria	62,9	61,4	2,3
Marche	64,4	63,8	0,9
Lazio	59,3	58,5	1,4
Abruzzo	57,6	56,3	2,3
Molise	52,3	52,0	0,7
Campania	44,1	45,0	-2,0
Puglia	45,7	45,0	1,6
Basilicata	50,3	49,1	2,3
Calabria	45,6	46,0	-1,0
Sicilia	45,0	43,2	4,2
Sardegna	52,3	51,2	2,1
<b>Italia</b>	<b>58,4</b>	<b>57,4</b>	<b>1,7</b>

Source: Elaboration Webresearch -on Istat data

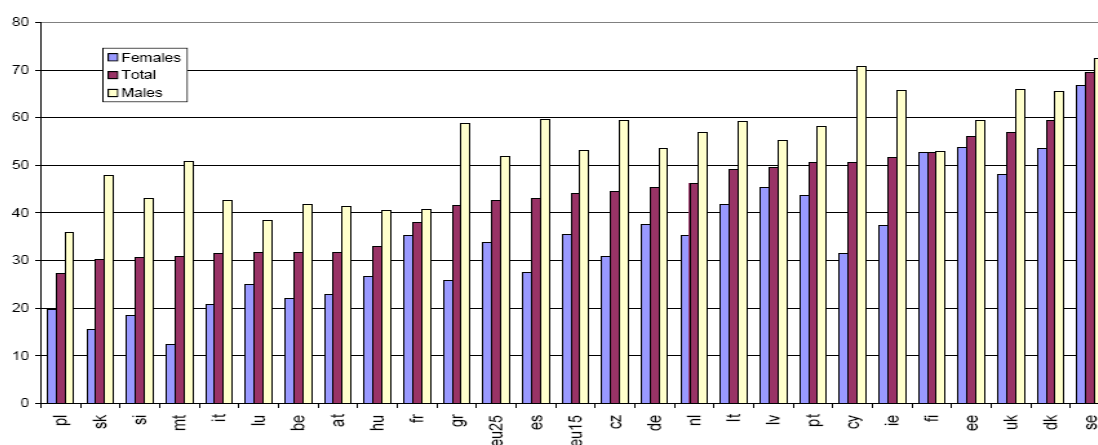
Table 2:

Projections – EU25

<b>Projections for EU's population trend 2005-2050</b>				
<i>in thousands</i>	<b>2005-2050</b>	<b>2005-2010</b>	<b>2010-2030</b>	<b>2030-2050</b>
<b>Total population</b>	<b>-8659</b>	<b>5563</b>	<b>5312</b>	<b>-19534</b>
<i>Percentage change</i>	<b>-1,9%</b>	<b>1,2%</b>	<b>1,1%</b>	<b>4,2%</b>
<b>Children (0-14)</b>	<b>-13811</b>	<b>-2304</b>	<b>-6080</b>	<b>-5427</b>
<i>Percentage change</i>	<b>-18,6%</b>	<b>-3,1%</b>	<b>-8,5%</b>	<b>-8,2%</b>
<b>Young people (15-24)</b>	<b>-14035</b>	<b>-2383</b>	<b>-6663</b>	<b>-4990</b>
<i>Percentage change</i>	<b>-24,3%</b>	<b>-4,1%</b>	<b>-12,0%</b>	<b>-10,2%</b>
<b>Young adults (25-39)</b>	<b>-24867</b>	<b>-3896</b>	<b>-14883</b>	<b>-6088</b>
<i>Percentage change</i>	<b>-25,0%</b>	<b>-3,9%</b>	<b>-15,6%</b>	<b>-7,5%</b>
<b>Adults (40-54)</b>	<b>-18666</b>	<b>4116</b>	<b>-10029</b>	<b>-12754</b>
<i>Percentage change</i>	<b>-19,0%</b>	<b>4,1%</b>	<b>-9,8%</b>	<b>-13,8%</b>
<b>Older workers (55-64)</b>	<b>4721</b>	<b>4973</b>	<b>8717</b>	<b>-8969</b>
<i>Percentage change</i>	<b>9,1%</b>	<b>9,5%</b>	<b>15,3%</b>	<b>-13,6%</b>
<b>Elderly people (65-79)</b>	<b>25688</b>	<b>1947</b>	<b>22281</b>	<b>1460</b>
<i>Percentage change</i>	<b>44,5%</b>	<b>3,4%</b>	<b>37,3%</b>	<b>1,8%</b>
<b>Frail elderly (80+)</b>	<b>32311</b>	<b>3109</b>	<b>11969</b>	<b>17233</b>
<i>Percentage change</i>	<b>171,6%</b>	<b>16,5%</b>	<b>54,0%</b>	<b>50,8%</b>
<b>Source : EUROSTAT, 2004</b>				

Figure 3:

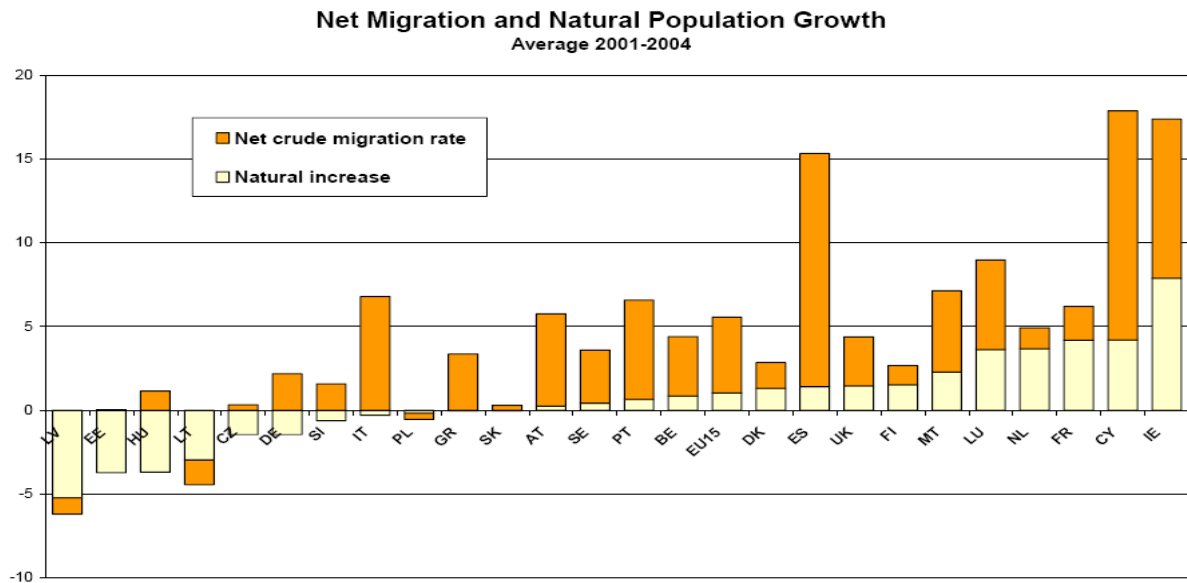
Employment Rate of Older Workers, 55-64 Years (2005)



Source: Eurostat, Labour Force Survey



Figure 4:



Source: Eurostat. Figures exclude intra-EU flows and comprise regularisations of previously undeclared migrants

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ISTAT (Istituto statistico Italiano) [www.istat.it](http://www.istat.it)

ISFOL (Istituto per lo sviluppo della formazione dei lavoratori) [www.isfol.it](http://www.isfol.it)

Ministero del Welfare [www.lavoro.gov.it](http://www.lavoro.gov.it)

## Youth Transition from School to Work in France: National and Regional Aspects

*Yvette Grelet / Bernard Hillau*

### 1. Stakes of Youth Transition in France

The transition from school to work is for long a problematic issue in many European countries, especially in France where the labour market integration of young newcomers seems particularly hindered. The unemployment rate of the French 15-24 was in 2007 of 19,4% compared to 15,2% in the EU25 (Eurostat, Labour Force Survey). If one considers the proportion of unemployed young people among the overall population, the difference reduces, due to the high rate of French youth still enrolled in education at this age. It is nevertheless still above the EU25 average (7,3% compared to 6,8%).

It is possible to point out some of the main societal features. Their combination may explain the relatively poor achievement as regards French youth transition. Among the institutional bases of labour market entry patterns identified by international comparative researches led for almost 30 years, Müller and Gangl (2003) underline the role of education and training system, and the organisation of the youth labour market.

As in many European countries, the French education and training system is highly standardised on a national basis, not only in the academic tracks, but also in the vocational tracks: contents of curricula and of diplomas are determined at the national level. This ensures titles and certifications to be a clear signal of skills and qualification for employers.

The French education and training system is also stratified, above all upon the opposition between general, and vocational track which split at the most important selection stages of secondary education: the end of primary level of secondary education (corresponding to upper age limit of compulsory education), the first year of secondary school and the terminal year of secondary cycle (where a third track opens, the technological one, between the academic and the vocational tracks). There are few bridges between schooling pathways at the secondary level. These pathways are clearly differentiated, along with their outcomes on the labour market: the general track opens up entry to tertiary education up to the highest levels and then to managerial positions; the technological track allows for entry to tertiary education, and leads to intermediate professional occupations; those who follow the vocational track up to the vocational baccalauréat, and pass, are in principle allowed to enrol in tertiary education. However, those who attempt such a challenge rarely succeed, due to their poor academic background: the vocational track of secondary education and training system leads to skilled or even low-skilled manual or clerical jobs.

The advisory and guidance system at school is often blamed for a number of schooling failures, and for the way young people are advised along the construction of their educational pathways. They are suspected to be more sensible to the needs to fill empty classes than to individuals' aspirations. Besides, the track assignment process, far from compensating the effect of family background, facilitates the replication of social positions (Bourdieu, Passeron, 1964).

Youth transition in France suffers from loose coupling of the education and training system with employer systems, and a limited school involvement in employment decisions. Employers often prefer to "buy" the outputs of the educational system by using

qualifications as a criterion in recruitment. As it seems that a better linkage between French labour market and education and training system could help improving youth labour market integration, it was attempted to reinforce the role of employers in the education/training system and in providing continuing training within the workplace. This was made through the development of vocational training and on-the-job training measures and particularly through the impulse given to apprenticeship<sup>70</sup>, which occurred within the frame of decentralisation of responsibilities in this field from the State to the regional level.

As regards continuing education provided in or out the workplace, it is clearly distinct from initial education and training system. The “return” to education and training is then not facilitated. The second European continuing training EUROSTAT survey (CVTS-2) shows that Southern countries (among which France) have the lowest percentage of firms involved in training (Théry et al., 2002).

As regards youth labour market, we have to keep in mind that newcomers are in a minority in the overall amount of recruitments. In France, lower grade jobs are filled from outside the firm with mobility into higher positions taking place after a period of (firm-specific) training, which is typical of an internal labour market; by contrast, in occupational labour markets, jobs are clearly defined in terms of content with high levels of consistency across firms and/or industries. The observed trend is that internal as well as occupational labour markets are less and less open to young beginners, whose entry port is commonly external (secondary) labour market, where the competition between workers is harsh, and where frequent mobility between firms reflects job insecurity. In a context of flexibilisation of employment due to the globalisation of economy, the more fragile part of the manpower (new entrants, elderly workers, less qualified people, women) tend to play the role of “adjustment variable” on the labour market. In particular, young people are in the first place exposed to the consequences of a bad economic climate, as can be seen when comparing the unemployment rate of two cohorts of labour market entrants: those who entered the labour market in 1998 benefited from the bright spell of the early 2000’s, while those who entered in 2001 had to cope with the employment degradation which followed the economic upturn (Joseph & al., 2008).

At the beginning of their working career, young people often alternate unemployment spells and short-term contracts, part-time jobs and low salaries. This is the lot of the least qualified new entrants. Actually, despite the educational expansion, there still remain an irreducible proportion of young people who exit initial education without any diploma (15%), or even who didn’t reach the first level of qualification<sup>71</sup> (8%). Many of them dropped out from school, where they often failed, were reluctantly oriented towards vocational tracks, and trained for an occupation which didn’t attract them. Continuing education may offer them a “second chance”. This would suppose, first that they will be lucky enough to hold a stable job in a firm giving them such an opportunity; second, that they would seize this occasion (many of them say they got sick of learning). However, the less successful of them will stay durably on the fringe of the labour market, and the role of numerous activating policies is to get them out of the trap of the secondary market.

The French labour market is highly regulated, and as in many cases, youth employment policies may have been used to circumvent employment protection through the use of

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<sup>70</sup> In ten years, the number of pupils enrolled in apprenticeship increased by almost 25 percent.

<sup>71</sup> They exited the first cycle of secondary vocational education without passing the corresponding diploma.

lower youth wages and fixed-term contracts (Ryan, 2001). Anyway, the role of employment policies is diverse: aiming at providing young people altogether with qualification and experience and answer to employers' demand for more experienced young workers, training schemes permitted also to limit unemployment among young people. Initially created to facilitate the transition from school to work, they progressively took a growing part in the process of labour market integration: in the beginning of the 70's, 5% of the 16-25 benefited from a training/employment measure, they are 40% since the mid 90's (Gasquet, Roux, 2007). Public policies targeted have become a structural component of youth transitions.

To resume, we will borrow to Verdier (2001) his diagnosis on the French education and training "regime": "The combination of employment's rationing and uncertainty on individuals' skills increases the competition between individuals along the transition process. As a result, the mechanism of "selective exclusion" (Garonna & Ryan, 1989) is reinforced. The most qualified will gain a priority in access to employment. If possible, it will be a job which matches their qualification. If not, they will accept a job underqualified (which does not correspond to their level of education). Thus, they will take low-qualified jobs, which will become less accessible to less skilled young applicants, who will be the losers of this competition".

Among the remedies, decentralisation has been seen as a means for a better meeting of qualification supply and demand, especially at the lowest level of education: the least qualified young people are also the less mobile, and a better knowledge of the local labour market as well as the local training system could allow for a sharper expertise of the relationship between training and employment, and a more effective monitoring of both. Pathways within the educative system and transition from school to work unfold in a specific environment, which "shapes individual's choice and actions" (Allmendinger, 1989). It is worth taking account of 'societal effects' observable at the local level. The development of regional policies could favour a better coordination of the different actions at the local level, targeted at the least qualified young people, and aiming at guarantee more security of routes on the labour market, through continuing education and training.

## **2. Methods of Longitudinal Survey**

### ***2.1 The Insee's "Labour Force Survey": an "Ad Hoc Module" Focused on Young People***

The National Institute for statistical and economic studies (INSEE) carries out every year the Labour Force Survey, addressed to a sample of 80 000 households. The questionnaire of the "Labour force survey", addressed to adults and young people comprises numerous questions about the type of household, employment situation, level of studies, etc. In 1992, a "ad hoc module" was added which focused on young people, and is of a great interest from a methodological point of view. This supplementary is a survey addressed to a subset of 10 000 young people from 18 to 29 years old. A set of specific questions examines more precisely occupational situation of each individual and replaces it's curriculum « in the general context of youth events »: end of studies, departure from parent's home, family start, spatial mobility, etc. ». Some special focus particularly on the setbacks of careers, the weight of network relations etc...

Such a survey has been achieved selectively; however it allowed to address issues that concern typically young people and to apprehend the effects of general evolution of their economic and social situation.

## **2.2 The “School to Work Transition Survey” of the Céreq**

French transition surveys focus on school leavers, in contrast with many other national transition surveys which focus on “age” rather than “stage” as a basis for sampling. The reason is that the need for a better knowledge of the pathways within the school system is less important in France than in other countries, which have less standardised educational systems (this need is nevertheless growing in France, with the complexification of educational pathways). Besides, Céreq longitudinal surveys cover the full cross-section of school leavers, this allows for the analysis of potential competition between secondary school-leavers and graduates for the access to specific occupations.

The French survey system is composed with short-term surveys led 7 months after leaving secondary vocational school or apprenticeship (IVA for school leavers, IPA for those exiting apprenticeship) and with medium term surveys interviewing large sets of young people leaving school at any level of initial education or training (three years after for the basic surveys, 5 years and 7 years for the others).

The investigation is conducted through phone call based interviews with each young person. It contains several series of information: 1) the situation at time of survey (unemployment, training scheme, inactivity, employment and type of job, etc.); 2) a complete description of each past employment period and unemployment spell, summed up in a retrospective calendar of former situations 3) schooling curriculum and family background. Data processing is based on « longitudinal » methods, which make a large place to sequence of situations and leads on to types of trajectories.

Céreq, a French national organism is in charge of this kind of studies to inform authorities about school to job transition.

The Ministry of Education for example can use these data to follow pathways out of diverse education or vocational training tracks and evaluate their education returns on the labour market.

Since foundation of the surveys at the end of the seventies, they surveys have evolved towards more diversification but also more integration. For example, short-term surveys IVA/ IPA, have been transferred to academic authorities in regions, and are locally administrated. The “three years after” survey is still managed at a national level by Céreq. Formerly organised in a cycle of successive waves, each one focusing to a specific level of education, it has been for 15 years now organised in order to interview at the same time a sample of school-leavers exiting at every level of education. About 50.000 questionnaires are collected every 6 years for these surveys completed by alternative surveys of 20.000 questionnaires, three years after.

The national survey «Génération 92 » questioned in 1995 a representative sample of the education system 3 years ago. It started by this way a new observation and evaluation period by comparing school-leavers cohorts at different levels, from those exiting with no qualification to the most graduated.

Since «Génération 1992», Céreq has implemented three other waves of surveys: «Génération 98», «Génération 2001», «Génération 2004» (Céreq 2005).

### 3. School to Work Transition in Provence – Alpes – Côte d'Azur Region

Compared with national stakes, the conditions of school-to-work transition in region depend on some effects of local context:

- regional structure of economic activities, which generate specific needs in vocational skills;
- regional structure of vocational training system: rates of initial and post-initial education; weight of different pathways in vocational training (education-based versus apprenticeship, training for young unemployed people);
- Demographical structure (rather young population or not, growing or not...);
- Regional labour market functioning; both for the whole population and for the young people...

About these different points, the PACA region is a very specific one as can be seen through statistical indicators.

As concerns the structure of educational system, the PACA region displays a rate a little above the national rate for young people going through apprenticeship. Among this population, the proportion of those who leave at a lower level of qualification is more important too (80% in PACA, 74% in whole France).

This situation can be brought closer to the regional economic structure. Small firms of retail and catering activities are very numerous, and they use preferably apprenticeship at a first level of qualification. It is even visible in the education district of Nice, where tourist industry is important compared with the education district of Aix-Marseille which is closer to the national structure.

School to work transition is a little more difficult in the PACA region than in France as a whole because of an unfavourable labour market. The last census of French population has shown a rate of unemployment up to 12.9 % in PACA compared with 9.6% in France.

However, the gap between PACA and France is less important concerning the young population: 29.6% in the region compared with 27.7% in France. This is related to the regional economic structure, with activities recruiting young people such as catering, retailing and services.

Seven months after entering on the regional labour market, the situation of young people is quite good: 73% among young people that left education/training system are employed. The beginning of the 2000's is a period of economic revival in PACA as well as in France, and this reflects the economic climate.

At the same time, a survey has been carried out on young people who left the education system three years before. It confirms the good performance of labour market during this period (1998-2001). In the PACA region young people who left school at the lowest qualification level are particularly penalised on the labour market: 43% of them are employed compared with a national average of 59%.

However, even with at a first level of qualification, (CAP: Certificate of vocational competence, BEP: Vocational studies diploma, both ISCED 2 level) 70% of young people are employed three years after leaving school. In this region, qualification appears as a real bonus for labour market entry.

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## 2.2 Target Group Monitoring focussing on Low-Skilled, Semi-Skilled and Skilled Employees and Unemployed

### Introduction

Target groups of labour politics can also be defined on the basis of qualification profiles. Besides low-skilled workers there are also semi-skilled and (highly) skilled individuals. The five contributions to monitoring these target groups are grounded in generating information to be utilised in informing political actors. This assumes a limited spectrum of users of this information. Several contributions address the difficulty of determining the target group. Nils Beckmann assesses the data basis used to determine low-skilled employees in Germany. Silke Böttcher, Natalie Krämer, Markus Lohr and Michael Morlok make clear that the data to define the groups are not identical in Germany, Switzerland and Austria and this creates new obstacles for operating a trans-national target group monitoring. Patrizio Di Nicola and Alessia Cremonini outline which constellations of characteristics can be used to identify semi-skilled workers in Italy. The definition of skilled labour seems to be the clearest. Markus Höhne, Carsten Kampe and Anja Walter use educational degrees in Germany, while Iwona Kukulak-Dolata suggests using various filters, applicable with available data, in Poland. Each of the contributions shows that a target group monitoring based on qualification groups draw primarily on the thematic areas of employment and unemployment and as Nils Beckmann demonstrates the further or professional training. The acquired information is communicated to the users through exchanges such as workshops as Böttcher and her colleagues show. Höhne and his colleagues illustrate consultancy and the use of web sites to permit the channelling into the Action component of monitoring.

A target group monitoring of low-skilled workers is taken on by Nils Beckmann at the level of a federal state in Germany (*Bundesland*). His main focus is designing an approach to generate adequate data for measuring the degree of involvement in further training. The same target group is used by Silke Böttcher, Nathalie Krämer, Markus Lohr and Michael Morlok. The authors are rooted in political consultancy in Germany and in the Austrian Labour Administration. They strive for a common effort in order to establish a cross-border target group monitoring in the Lake Constance region. Up to now, the group of semi-skilled workers has received much less attention in labour market politics, a point raised by Patrizio Di Nicola and Alessia Cremonini. Through their description and considerations towards the unique determination of this target group they lay the groundwork for further interesting discussions. Skilled workers are frequently a subject for labour market politics, especially in the context of monitoring in order to recognize a shortage in advance and to attempt to prevent this shortage. Iwona Kukulak-Dolata investigates what data can be drawn upon in Poland to conduct this type of target group monitoring. A very complex skilled labour monitoring system with several data examples and applications is introduced by Markus Höhne, Carsten Kampe and Anja Walter. With deep expertise they have built up such a system for the federal state of Brandenburg in Germany. This system offers not only information to the current situation, but also prospective information. It can be considered to be a good model for an information system.



## Monitoring the Involvement of Low-Skilled Employees in Life-Long-Learning in Germany

*Nils Beckmann*

### 1. Introduction

As mentioned in the articles of Christina Stecker and Riccardo Romano in this anthology, the demographic change will affect the labour market significantly in most of the European States. Paired with a strong technological, structural economic change, a major challenge lies in achieving an adequate participation of elderly people in “life-long learning”.

However, “generation 50+” is not the only group that is under-represented in further training: Additional to the mentioned migrant workers, it is especially the group of low-skilled workers, who are far less integrated in such educational progress (Hummel/ Reinberg 2007). Resulting in an unemployment rate highly above average (Hummel/ Reinberg 2007), these workers in so far define a target group for political actions.

On a way of measuring the participation of certain target groups in “life-long learning”, several aspects have to be considered carefully, before such a project can be implemented in an adequate way. Starting with a definition of the concrete issue concerned, when it comes to participation in “life-long learning”, the problems of measuring this participation and defining the target-group in such a way, that data can be surveyed or even collected, there are some hurdles to be overcome. In this article, these steps are presented for the participation of low-skilled workers in further training as a starting point for a project in Hessen, Germany.

### 2. Defining Further Training

First of all, the target groups, which are under-represented in life-long-learning, have to be explored. Therefore, the term “further training” has to be defined in detail. In Germany, the common definition of further training includes (Kuwon et al 2006):

- formal professional training,
- informal professional training,
- general and political training,
- private learning,

### 3. Measuring Participation

While being substantial forms of further training, measuring the participation in general and political training and especially private learning sets up different methodological problems, when it comes to counting persons with specific attributes: Participants normally can't be grouped by age, gender or professional status; above that, the number of persons, who participate in more than one course, is hard to evaluate.

On a way to monitor the extent of participation of different groups on *formal professional training*, this kind of further training can be subdivided by the different bearers of the emerging costs (Baden/ Schmid 2008:11):

- Advanced vocational training – The firm bears direct (monetary) or indirect costs (because of the exemption of a worker)
- State-aided individual training
- non-aided individual training (fully paid privately)

*Informal professional training* on the other hand is hard to measure, except for the part that is observable to the firms in terms of emerging indirect costs.

Correspondingly, this differentiation can be a starting point for evaluating the participation of certain groups on formal and informal professional training: While for advanced vocational training, interviewing the businesses themselves is the best way to survey which firms do invest in which of their employees. Official statistics can inform about the state-aided part of formal professional training; especially about the participation of unemployed people. About the third aspect of formal professional training, the providers of such training issues seem the adequate group to be contacted.

#### **4. Identifying "Target Groups"**

The next step is to substantiate the groups to be evaluated from the several actors. As a first indicator to identify certain groups, a look at the unemployment rates of different groups in Germany shows, beside "generation 50+" it is especially the employability of low-skilled people, which seems not to be sufficient to meet the challenge of the structural economic change described above: In 2005, such low-skilled people experienced unemployment rates that are about six times as high (26%) as rates experienced by individuals with a college degree or more (4%) (Hummel/ Reinberg 2007).

Above that, studies results indicate that certain firm-attributes determine the level of advanced vocational training for certain groups of employees: The group-specific participation in advanced vocational training varies widely between different economic sectors and the number of employees employed (Baden/ Schmid 2008).

For a target-group-specific employment promotion, all that has to be taken into account before the information is surveyed.

#### **5. Exploring Reasons for the Absence of Further Vocational Training**

Recent studies shows that albeit often being grouped under one label altogether<sup>72</sup>, various reasons have to be taken into account for non-participation of elderly and low-skilled workers. Moreover, there are differences between certain types of enterprises, too. Especially SME seem to exclude low-skilled workers because of specific reasons (Lachmayr 2006:11f.).

Consequently, interviewing the businesses themselves is the best way to survey which firms do invest in which of their employees and what circumstances or concrete incentives could enforce the inclusion of these workers. Therefore, the specific data for each of the defined target groups has to be adequately answerable by the businesses.

Monitoring the group of low-skilled *employees* and especially unemployed and their motivation to participate in further training, sets up some problems: Questions about the motivation for vocational training and adequate incentives tend to be difficult to be asked from both of the groups.

To solve this problem, a set of qualitative interviews with persons concerned could be the starting point, followed by a consequent monitoring concept of the development of certain activities before and after setting specific incentives for these employees and the corresponding employers.

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<sup>72</sup> In German, elderly and low-skilled workers often are labeled "bildungsfern".

## 6. Target Group Monitoring of Elderly and Low-Skilled Workers in Hesse, Germany

The Hessian Ministry of Economics, Transport, Urban and Regional Development initiated in 2007 a study concerning elderly and low-skilled workers. In a first step, an establishment survey took place for Hessian SMEs, designed to be representative for the state of Hesse and its administrative districts.

The companies in this survey not only were asked to describe the actual and future activities in advanced vocational training of the workers employed, but also the specific situation of employees of different working groups. Additional to that, a part of the survey covered the topic, how to enforce the participation of the two target groups described above – the elderly and the low-skilled workers – through different incentives. Before concrete incentives and framework requirements for a higher participation of target-group-members in advanced vocational training were rated by the business, in a first step, specific barriers were evaluated.

Hence, with this concept the basis for target-group-specific incentives is provided by a business survey, which also can be used to gain insights of the success of certain incentives and arrangements in the future.

For designing the incentives needed precisely, the members of the target-groups themselves have to be considered in a next step; without that, the often diagnosed lack of motivation of members of the target-groups for further training at all could hardly be overcome.

Therefore, in a second step, elderly and low-skilled workers will get qualitatively interviewed about the specific barriers and incentives for participating in all different kinds of further training. The selection of these respondents will be based on the different business-types explored in the first part of the project. After interviewing the members of the specified target-groups, with information from both businesses and workers, incentive-systems will be worked out, which in the future can be tested for their transferability.

Especially when it comes to educational issues, impacts of different actions can be observed only with a time-lag of several months (at least). Hence, a continuous monitoring through repeated surveys is indispensable: If positive effects appear only in some cases e.g. sectors, without such a monitoring this could not be identified and the incentive-system could not be adjusted promptly. Finally, integrating monitoring, successful incentive-systems can be identified and checked for their transferability on other businesses, which then could be monitored as well in a further step.

## 7. Benefits and Expandability

The approach described above with a quantitative business-survey, supported by a qualitative approach to explore the perspectives of the target-group-members, is conditioned on these members to be employees. Even if that seems trivial: defining an other target-group – especially *unemployed* elderly and low-skilled people – a different research design would be necessary, because of new interest groups involved and most of all an extreme access-problem to the target-group-members.

Although all problems in monitoring the participation of selected target-groups in further training, the findings could be worth the efforts: If participation on life-long learning could be enhanced by adequate incentive-systems to a certain amount, the benefits of such an approach would exceed the costs by far.

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## Low-Skilled Employees as Target Group for Labour Politics

*Silke Böttcher / Natalie Känel / Markus Lohr / Michael Morlok*

### 1. Low-Skilled as Target Group of a Regional Labour Market Monitoring

The risk of becoming unemployed is above average in the case of low-skilled. Although the qualification specific unemployment rate varies between states, the phenomenon itself of higher unemployment among the low-skilled remains. The project "Chances for the low-skilled" focuses on the low-skilled as a target group for a regional and international labour market monitoring in the Lake Constance area.

Due to technological advancement, internationalisation of markets and the accompanying relocation of production beyond state borders, developed industrial countries are specialising more and more in the production of premium services. This development has resulted in constantly changing qualification demands. Simple and repetitive jobs are fast losing their relevance whilst expectations put on the low-skilled workforces are becoming greater and vocational training is becoming increasingly important.

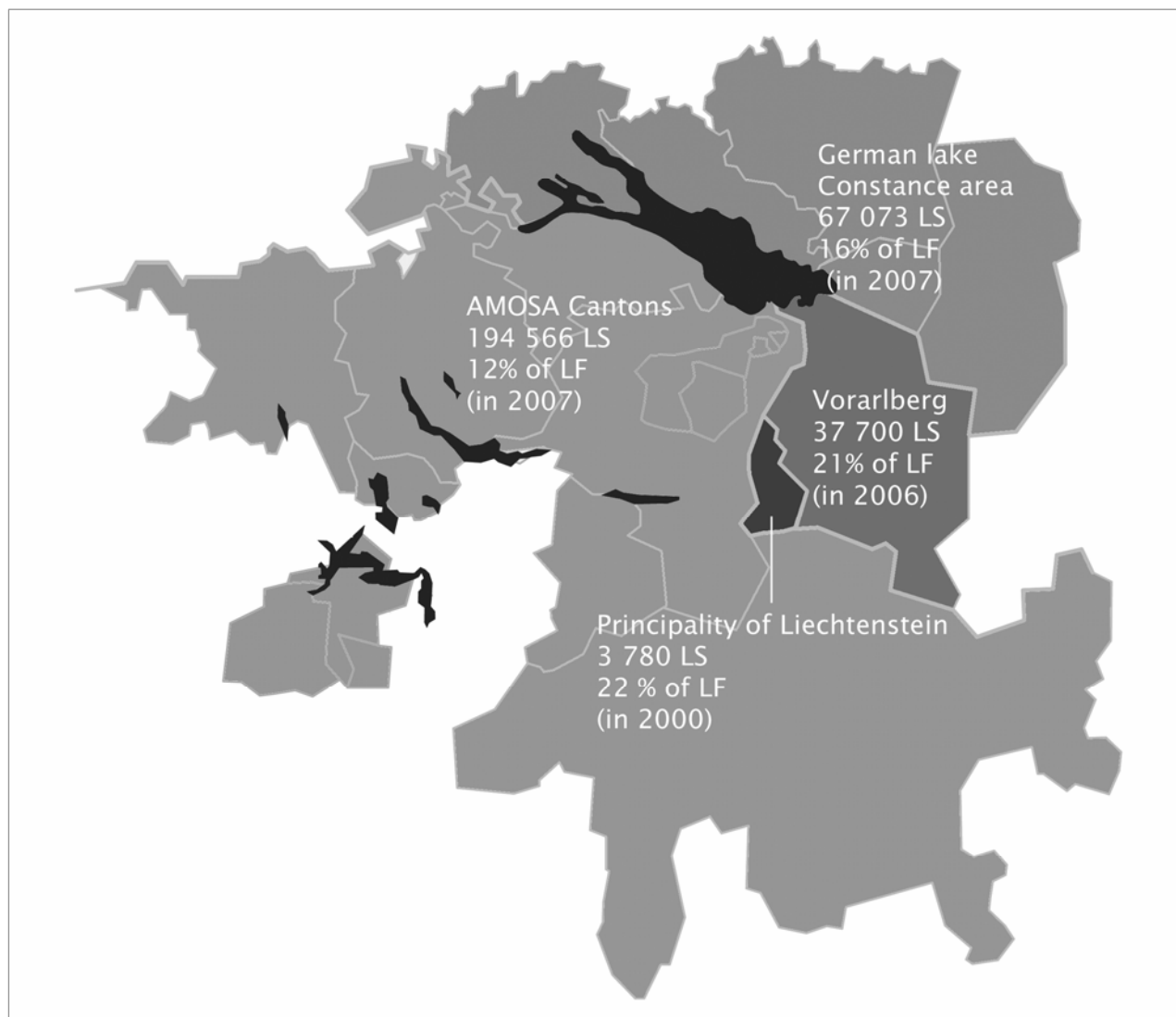
The low-skilled do not only face a higher risk of becoming unemployed. Once they become unemployed, they require support for longer. Their chances of reemployment are limited. Due to this difficult position, together with the sheer amount of low-skilled unemployed workers, (the Lake Constance region has between 23 and 52 percent registered low-skilled unemployed workers, depending on the area) the under low-skilled form an important target group for the labour market authorities.

The labour market authorities in the international Lake Constance region aim to achieve the following with the project "Chances for the low-skilled":

The provision of scientifically-proven information from those involved (labour market authorities, companies, job-seekers and educational institutions) should lead to a greater awareness of the chances and risks of the low-skilled in the labour market.

- An international exchange of information around Lake Constance about the labour market chances of the low-skilled and the methods implemented thus far should take place.
- Realisable and lasting, effective measures for the prevention and combat of unemployment among the low-skilled together with contact with the low-skilled job-seekers should exist.
- A basis should be found to implement trans-border work management.
- Motivation on the part of all those concerned must exist in order for these measures to succeed.

*Figure 1: Number of low skilled (LS) and their percentage of the labour force (LF) in the international Lake Constance area*



## 2. Procedure

### 2.1 Practical Approach

A practical approach was chosen in order to reach the project's targets. This method manifests itself especially in the composition of the project team, in which spokespersons of the regional research institutions (AMOSA and Translake Plc) and experienced experts from the labour market authorities (those from the Swiss AMOSA cantons, The Federal Employment Office in the German regions and their equals in Vorarlberg and Liechtenstein) are all equally represented.

## **2.2 Data Analysis**

The low-skilled in this project are defined as persons without a recognised completed vocational training. National discrepancies among variables due to e.g. differing national educational levels, legal frameworks and ascertainment times, mean a particular challenge for such an international project. For this reason the results are not completely comparable, which is why the focus was aimed at temporal development.

In order to give the most detailed impression of the labour market for the low-skilled, the administrative data was evaluated in its corresponding region. The following research questions were answered:

- 1) How many low-skilled persons have a job today? How many were employed ten years ago?
- 2) In which economic sectors were / are the low-skilled employed?
- 3) Who are the low-skilled workers (Age, sex, nationality)?
- 4) Which factors have influenced the development of the labour market for low-skilled persons thus far?

The following questions were examined in the data analysis regarding job-seekers at labour market authorities:

- 1) How has the amount of low-skilled job-seekers developed?
- 2) How high is the risk of becoming unemployed when low-skilled?
- 3) Who are the low-skilled unemployed?
- 4) How many of the low-skilled become permanently unemployed?

## **2.3 Surveys**

The analysis of the available data was complemented with further research (surveys from employers, social partners, temp agencies, educational institutions and representatives of various authorities).

Interviews corresponding to guidelines were carried out with 46 people either responsible for personal in companies, employees of temp agencies or social partners. The opinions of such people proved indispensable for the formulation of realistic measures for improving the chances of the low-skilled.

Furthermore, surveys were carried out among the heads of departments responsible for the advising and qualifying of the unemployed at the labour market authorities in the Lake Constance region. Thus it was possible to gain insight into the existing offers available for low-skilled job-seekers. Another 23 representatives comprising of labour market experts, career advisers, educational- and migration authorities from the Lake Constance region were questioned. Four interviews were performed with educational institutions which have close client contact with the low-skilled and which could add an additional exterior view regarding the treatment given to the low-skilled by the authorities. These talks lasting about 90 minutes gave an overall impression of the current situation. Finally, online-surveys were also carried out at 115 job agencies / advisers in order to test / answer previously developed theses.

The following research questions were answered in the interviews with company representatives and social partners:

- 1) How will the demand for low-skilled employees develop from the perspective of employers, their unions and trade unions?

- 2) Which strategies are adopted by employers and their unions and trade unions regarding the low-skilled? Which strategies are (not) supported by the labour market authorities?
- 3) Which conditions are necessary for companies in order to create more jobs for the low-skilled?

Answers were found for the following questions put to the representatives of the authorities and educational institutions:

- 1) Which strategies are used by the authorities when a low-skilled job-seeker wishes to return to employment?
- 2) Which methods are implemented by the authorities to help the low-skilled job-seekers re-integrate (advice, qualification aid / programs)?
- 3) Which strategies are used in combination with other authorities (vocational, educational, migration authorities)?

Figure 2: Set of indicators

1. Low-skilled workers in the international Lake Constance region – evaluation of administrative employment data:
  - a. Number of low-skilled workers according to differing socio-demographic characteristics (age, sex, nationality)
  - b. Number of low-skilled workers according to trade and sector
2. Low-skilled unemployed workers in the international Lake Constance region – analysis of administrative data
  - a. Number of low-skilled job-seekers according to differing socio-demographic characteristics (age, sex, nationality)
3. The low-skilled in companies – interviews with employers, social partners and temp agencies:
  - a. Field of activity of the low-skilled in companies
  - b. Demands placed on the low-skilled
  - c. Recruitment of the low-skilled and their application behaviour
  - d. Possibilities of furthering soft skills
  - e. Questions regarding the future development in the numbers of the working low-skilled and the factors necessary for such a development
  - f. Ideas of how the chances for the low-skilled can be improved in the labour market
4. Strategies und instruments for the low-skilled – a written survey for labour market authorities, conversations with experts and internet surveys
  - a. Job-seeking difficulties of the low-skilled
  - b. Existing measures for the integration of the low-skilled into the world of work
  - c. Questions regarding the future development in the numbers of the working low-skilled and the factors necessary for such a development
  - d. Ideas of how the chances for the low-skilled can be improved in the labour market



### 3. Results

#### *The amount of employed low-skilled workers is decreasing*

In the last ten years the number of the employed low-skilled has dropped significantly. In 1997 there were 340,000 low-skilled workers, in 2007 there were 300,000, which reveals an annual decline of 1.1 percent. During the same period employment figures in general have increased by 1.1 percent.

#### *No rise in the unemployment of the low-skilled*

A clear tendency towards increasing or decreasing unemployment among the low-skilled can not be determined. The quota of the low-skilled amongst all job-seekers remains astonishingly constant. The decrease in work among the low-skilled has caused little change in the increase of job-seeking numbers. In contrast, the unemployment of the low-skilled is 1,9 times higher than average.

#### *An increase in service-sector jobs is expected*

The decrease in work among the low-skilled since the mid-nineties has not had the same affect on all economic sectors. The low-skilled were employed in some sectors more than in others. The most jobs for the low-skilled were lost in the industry, trade and repairs sectors. In some service sectors there are now more low-skilled workers to be found than ten years ago, most clearly seen in the company-related service sector. Commensurate to this trend are the prognoses made regarding the future of the labour market for the low-skilled: those asked are mainly pessimistic about the second sector and foresee a higher amount of unemployed low-skilled workers in the future. The tertiary sector, however, is looked upon with optimism.

The increasing prominence of the service sector correspondingly increases the demands made on the workforces. Even untrained workers must bring with them key qualifications such as flexibility, dependability and a tidy appearance. Many less-demanding jobs are only being given to trained workers.

#### *The lack of skilled workers as a chance for the low-skilled?*

In the past simple tasks were often integrated into the job description of skilled workers. As a result, such tasks were no longer available for the low-skilled. In the future, however, this will no longer be realistic and the experts expect a lack of skilled workers. In specific sectors (catering, retail, communication technology, special-purpose vehicle construction) there has already been an improvement in the employment of low-skilled workers. But according to those asked in the surveys the lack of skilled workers still harbours risks for the low-skilled – if a required minimum of experienced, skilled workers no longer exists then the accompanying jobs for the low-skilled will also disappear.

#### **4. A Plan of Action Conference as the Central Building Block of the Project**

On 18<sup>th</sup> and 19<sup>th</sup> September 2008 a conference shall be held for „Chances for the low-skilled“ in Lindau at Lake Constance. This will be an opportunity for about 180 representatives from companies, private agencies, employers, unions, labour market authorities, career advisers, educational institutions, social services, migration / integration experts, private educational sponsors amongst others to discuss and increase the measures taken in all four countries to increase the chances of the low-skilled in the working world.

The basis for this conference shall be the results of the research project. Initiators of the conference are the labour authorities at Lake Constance (the Principality of Liechtenstein and Voralberg labour market services, the Kempten, Konstanz and Ravensburg work agencies and VSAA East). AMOSA and Translake Plc are organising the conference. The measures agreed upon at the conference shall then be implemented in the whole of the region. The final and work reports, together with the implementation report can be downloaded on [www.amosa.net](http://www.amosa.net) .

## Semi-Skilled Employees as Target Group for Labour Politics - An Italian Perspective

*Alessia Cremonini / Patrizio Di Nicola*

The typology of the “semi-skilled worker” is very hard to shape in a complete and exhaustive way, mainly because its mid-way position between the low-skilled and skilled employee. This concept is set, therefore, along a continuum that has on one side a worker with high vocational and professional skills and, on the other side, one being completely lacking of that.

As consequence, to define this typology of workers on the base of the acquired skills means to consider different degrees of professional trainings in a well-defined framework. Two scenarios are possible: in the first, the semi-skilled worker<sup>73</sup> is identified by a qualitative approach. We can adopt for measurement two intrinsic features related to the job description: a) the repetition of the assigned job and 2) the degree of discretionarily in fulfil a task.

The second scenario is given in the “*European industrial relations dictionary*”<sup>74</sup> that offers a definition of “semi-skilled worker” based on two quantitative variables: the level of manual ability and the short contractual term<sup>75</sup>.

The first definition of Gittleman and Howell (1995) requires the study of the qualitative features of job and it is hardly quantifiable; the second one, much more congenial to the approach of Target Group Monitoring, results to be limited for the understanding of semi-skilled workers in Italy.

One of the reasons at the basis of this consideration is that the two variables standing out from the European Foundation (the manual ability and the short contractual term) cannot be taken as decisive and exhaustive factors for the characterisation of a specific typology of workers.

In fact, as pointed out in Italy from l’ISFOL<sup>76</sup>, the short contractual term strikes almost all the typologies of jobs and in particular the people with a University or High School degree and the ones carrying out intellectual professions (see table 1).

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<sup>73</sup> The “semi-skilled white-collars” are characterised by regular tasks with limited discretionary power. The “semi-skilled blue-collars” are characterised with specific working rules organised by supervisors.

Cfr. Gittleman M.B. / Howell D.R. (1995): Changes in the structure and quality of jobs in the United States. Effects by race and gender. In: *Industrial and Labour Relations Review*, ILR Review, ILR School, Cornell University, vol. 48(3): 420-440.

<sup>74</sup> Cfr. <http://www.eurofound.europa.eu/emire/UNITED%20KINGDOM/SEMISKILLEDWORKERS-EN.htm>

<sup>75</sup> Inside the *European industrial relations dictionary* are available also the specific definitions of semi-skilled worker in some countries in Europe (France, Spain, Denmark, UK): they identify this working typology for manual ability and absence of specialization. One of the most interesting aspects is the fact that the know-how for these persons can be acquired only in an organisation or in the place of work. (Cfr. <http://www.eurofound.europa.eu/emire/France/SEMISKILLEDWORKER-FR.htm>).

<sup>76</sup> Isfol (2007): *Rapporto 2007*, Isfol-IRS, p. 297.

Table 1: Short term contract by employment.

Career	% of short term contract on total employment %
Businessman and Managers	4,6
Intellectual and Scientific	19,9
Technical	14,5
White collar workers	10,7
Skilled careers in business	18,1
High skilled factory workers	8,2
Generic factory workers	13,6
Low-skilled	22
Others	3,0

Also the idea to find semi-skilled workers between manual workers is linked very much to the classes of analysis of the Industrial Society, having the habit to the classic division of the factory work. Today, however, if we look at the typology of jobs defined by the working contracts, we found inside the categories of workers with middle qualification different clerical categories, some professions in commercial and services sector, wide brackets of workers in agriculture, etc.

Table 2, shows the percentage of some specific employment groups, and also the estimates of growth of the different groups in the next few years.

Table 2: Employees for level of qualification vs the total employment and rate of growth (estimation 2005-2009)

Skill	Professional Groups	% over total employment	Var. % n. employed '05-'09
High	Legislators, Public Leaders	8,6	0,5
	Leaders of private companies and Freelancers	9,7	1,0
	Technicians	18,8	0,7
Intermediate	Office workers	11,3	0,5
	Qualified professions in commercial activities and services	10,6	1,1
	Farmers and skilled workers in agriculture and fishing	2,4	-3,1
	Craftsman and skilled workers	15,8	-0,1
Low	Manager of factory and semi-qualified workers in factory	8,6	-0,1
	Unqualified Professions	13,2	1,1
Total		100,0	0,5

According to the above, workers in intermediate qualification in 2005 represent 40,1 % of the employees and in 2009 they will suffer a light reduction, in particular in the manual professions (farmers, craftsman and factory workers).

Others semi-skilled, with a light occupational increase will be office workers and professions in commercial activities and in general services. All this emphasises that semi-

skilled workers are not mainly in manual professions. And this even if the occupational structure by fields and professions in Italy is still traditional, with a small percentage of employees in the service sector and a modest quota of high qualified jobs.

From this point of view, the stability of the occupational structure and the dynamics of growth for professions in Italy is very different respect to other countries.

In fact, if we look to UK and USA the estimations at 2014 show that “high ” professions will cover almost half of the available working positions (45,3% in UK and 38,7% in USA) with a significant difference respect to Italy ( 37,1%)<sup>77</sup>.

The above show that the group of semi-skilled workers is variegated and characterised by different points: manual working and short term contracts do not represent decisive factors to their identification, while professional placement and formal qualification have much more importance. The latter one, however, often is not related to the job carried out: in fact many workers are engaged in jobs with lower qualification respect to their formative score, for example because there are not suitable working positions<sup>78</sup>.

For all the above, the study of semi-skilled workers in Italy is partial and complex, also for the reason of the high rate of “black” work, where some authors have demonstrated the presence of workers with low degree of competences and unstable working relations<sup>79</sup>.

In conclusion, a suitable research approach on semi-skilled workers should take into consideration some qualitative variables as the repetition of work and low discretionarily, as per Gittleman and Howell (1995)<sup>80</sup>.

This implicates the necessity to perform an investigation ad hoc in specific sectors of business, as in the tertiary, in such way to study the intrinsic features of the jobs, the formative needs and the professional valorisations required from the semi-skilled workers.

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<sup>77</sup> Cfr. Isfol (2007), p. 298.

<sup>78</sup> Naticchioli P. / Ricci A. / Rustichelli E (2008): *Wage Inequality, Employment Structure and Skill-biased Change In Italy*. In: *Labour 22 (Special Issue) 27 – 51*, JEL I20, J24, J31, Fondazione Giacomo Brodolini and Blackwell Publishing, p 40 -44.

<sup>79</sup> Reyneri E. (2002), *Sociologia del mercato del lavoro*, Il Mulino, p.55-60.

<sup>80</sup> Op Cit.

## Monitoring Skilled Employees in the Polish Labour Market

*Iwona Kukulak-Dolata*

### 1. Introduction

Relations occurring between labour demand and labour supply are reflected in the labour market. The labour market is a dynamic category and so it keeps evolving. Because the changes are typical of all developing economies, they have recently appeared also in Poland. Their sources include the socio-economic development of the country, the transition process, as well as Poland's becoming an EU member in 2004. This course of events calls for continuous observation of phenomena taking place in the labour market in order to identify possible regularities. Especially important is finding information about changes affecting the branch, sector, or occupational structure of the working population, as well as about gaps between the demand for qualifications and the supply of labour force. The obtained data allow us to determine the level of socio-economic development in the country and the direction of structural changes, but above all to ascertain whether the direction is correct compared with the highly developed countries.

In the next part of the article, our discussion will concentrate on the category of skilled employees, i.e. persons who apply their knowledge and skills in the work process. We will demonstrate how the category can be observed (monitored) in the Polish labour market. The first part of the article presents sources of information about skilled employees and the next one provides our opinion on the possibilities of applying some monitoring-related elements, tools, and procedures discussed in Chapter 1 of the anthology.

### 2. Types and Sources of Information about Skilled Employees

#### 2.1 Types of Information

Practice knows many types of information about skilled employees. In most cases the administrative data, the questionnaire data, and partial information are distinguished<sup>81</sup>. The administrative data is generated by various authorities, both at the central level (the Central Statistical Office – GUS) and locally (Voivodeship and Poviast Labour Offices, voivodeships' statistical offices). This information is reliable and gathered with predetermined frequency according to an established pattern; in many cases its scope is extensive and some institutions have mandatory reporting obligations. However, its usefulness for the labour market research is diverse, because the information does not result from the complete observation and so it is generalised, usually at the national level.

The questionnaire survey data have a higher informative value than the administrative data and they can be generated and analysed by various cross-sections according to the user's needs. They are costly to obtain, because a random sample to be surveyed has to be selected, a questionnaire survey based on a special questions has to be run, and the gathered data has to be sorted out and processed.

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<sup>81</sup> Góra M., Sztanderska U. (2006): Wprowadzenie do analizy lokalnego rynku pracy. Przewodnik. (Introduction to the Analysis of a Local Labour Market. A Guide), Ministerstwo Pracy i Polityki Społecznej, Warsaw, pp. 44-46.

## **2.2 Sources of Information**

There are three basic sources of statistical information about skilled employees: national censuses, enterprises' reporting activity, and labour force surveys. Other relevant examples are individual investigations requested by various scientific and research institutions that aim at obtaining partial information.

### **Censuses**

Information provided by national censuses is especially important as a source of knowledge about the working population. It is worth underlining that such information comes from the complete survey and applies to the entire population living in a given country in a specific period of time. In a sense, it gives a snapshot of the working population as of a given date. Each person is described using demographic characteristics (sex, age, marital status, etc.) and socio-economic characteristics (level of education, occupation, years of service, etc). From the viewpoint of the labour market policy, data characterising economic activity by the following cross-sections of population: employed, unemployed, economically inactive, working on private farms, occupation, and line of employer's business, are especially important. A national census views as economically active all persons aged 15 years and older, who are in the reference week:

- worked for at least 1 hour for pay or income, i.e. who were employed as hired workers, worked on their own (or leased) farm or ran their own business outside agriculture, assisted (without pay) in running a family farm, or a family business outside agriculture,
- did not work (e.g. because of sickness, vacation, a break in employer's activity, difficult weather conditions, a strike), but formally had a job as hired workers or self-employed persons. In line with the international standards, pupils who signed contracts with an enterprise or with a natural person for teaching a trade or for job-specific training are also treated as employed, if pay was involved.

Census data allow calculating the economic activity rate for a population, the rate of employment, and the rate of unemployment. These indicators can be designed for various cross-sections, depending on the researched subject. Standardly, they are automatically calculated using criteria such as sex, place of residence, and age, but more rarely for occupations.

Information on employees' jobs done in their main workplace is presented according to the Classification of Occupations and Specializations developed by the Institute of Labour and Social Studies in 1995 based on the „International Standard Classification of Occupations ISCO-1988” recommended by the International Labour Organisation.

While processing the census data, it is possible to group information on skilled employees' occupations by various cross-sections (e.g. age, level of education, section of economy). The survey's advantage is that it uses the same methodology to gather data on economic activity as the Labour Force Survey (LFS), and thus recommendations of international statistics are met. Census results are an important source of auxiliary data, necessary to calculate some relative measures describing the labour market situation. The most recent National Census of Population was conducted in Poland in 2002 (the previous one in 1988) and the next one has been scheduled for 2011.

### ***The Labour Force Survey (LFS)***

The survey has been conducted since May 1992 based on questionnaires. It is a standing (quarterly) and representative activity covering the sample of around 20,000 households. Its results are generalised to the entire population. Subject to observation are persons aged 15 years and older who are members of the drawn households. Three categories of persons are distinguished in the randomly assembled sample: employed, unemployed, and economically inactive. The main goals of the survey are obtaining information about the size and structure of labour force in Poland and monitoring the pace and directions of changes in the level of population's economic activity. The survey conforms to ILO recommendations and operates definitions and classifications of international statistics. The survey treats as economically active all persons aged 15 years and older who in the reference week:

- worked for at least one hour for pay or income, i.e. were employed as hired workers, worked on their own (or leased) farm or conducted their own business outside agriculture, assisted (without pay) in running a family farm, or a family business outside agriculture;
- had a job but did not work in it because of sickness or a maternity leave/vacation.

This category includes also pupils who signed contracts with an enterprise or with a natural person for teaching a trade or for job-specific training, if they were paid.

Information about employees' occupations in their main workplace is sorted out according to the classification of occupations and specialisations that has been in force in Poland since January 2005. The classification was made effective by the Regulation of the Minister of Economy and Labour of 8 December 2004 concerning the labour market classification of occupations and specialisations and the scope of its application. The classification is a five-tier and hierarchically ordered set of occupations and specialisations existing in the labour market that groups individual occupations (specialisations) and names them. It was developed based on the International Standard Classification of Occupations ISCO -1988.

It should be noted, however, that this survey allows analysing the qualification potential of employees according to so-called major groups of occupations (10 groups), such as public government representatives, senior officials and managers, professionals, technicians and associated professionals, clerks, personal service workers and shop and market sales workers, skilled agricultural and fishery workers, draft and related trades workers, plant and machine operators and assemblers, elementary occupations, armed forces. In practice, for the data to be arranged according to the groups substantial data aggregation must be performed. It is also notable that the data are general, because of their territorial coverage – they describe skilled employees at the country level. A much larger sample is needed to generalise survey results to voivodeships, which is currently impossible because of the survey's considerable costs. The information it generates is published by the Central Statistical Office in fascicles entitled "The Labour Force Survey".



### ***Enterprises' Reporting Activity***

Information derived from enterprises' reports is an important source of knowledge about skilled employees. It is worth stressing that the reports represent a regular type of observation, despite different reporting obligations of organisations that dependent on their size measured by the number of employees. Investigations taking advantage of the reports assume that employees are persons who perform jobs for pay, such as:

- persons with established employment relationship (based on employment contracts, nominations, appointments) or with service relationship,
- employers and own-account workers together with assisting household members,
- persons doing outwork,
- agents and their assisting family members, as well as persons employed by the agents,
- members of an agricultural producer cooperative,
- clergymen performing pastoral functions.

According to the above, this type of observation applies a different definition of employees than, for instance, the national census, or the LFS, which prevents international comparisons.

To describe occupational qualifications of the working population, the classification of occupations and specializations introduced by the Minister of Economy and Labour Regulation of 8 December 2004 on the labour market classification of occupations and specialisations and on the scope of its application is also used. From the viewpoint of skilled employee monitoring needs, the best informative value is offered by the labour demand reports (Z-05). The survey based on the reports is representative and it is conducted on a quarterly basis. Information on occupations is arranged according to 30 sub-major groups of occupations, being subdivisions of 10 major groups.

Results of surveys taking advantage of enterprises' reports are published by the Central Statistical Office in the Statistical Bulletin and in special studies such as "Aktywność zawodowa i bezrobocie w Polsce" (Economic Activity and Unemployment in Poland), "Pracujący w gospodarce narodowej" (Employees in the National Economy), "Monitoring rynku pracy" (Labour Market Monitoring), "CESTAT Statistical Bulletin", "Poland Quarterly Statistics". When using the data, one should bear in mind that some results are available once a year, that data are gathered at powiat and gmina levels, but presented by rather general cross-sections (except the labour demand survey), and that most of them are aggregated and refer to the numbers of employees.

### **3. Possibilities of Using the Labour Market Monitoring Concept to Study Skilled Employees**

The importance of the labour market monitoring concept presented in Chapter 1 arises from the fact that a State must be able to influence the labour market. This necessity is connected with gaps that occur between labour supply and labour demand. Such gaps are frequently structural, which means that the qualifications and skills of potential workers sometimes miss employers' needs. In addition, as indicated in the introduction, it is necessary to monitor changes in this area in the long term in order to determine the level of country's economic development, as well as changes affecting the economic structure.

Therefore, information about the degree of utilisation of the qualification potential can be interesting for various government and public administration institutions, local government institutions, schooling institutions and other educational units, placement agencies, pupils choosing their future education, enterprises, including investors establishing businesses in a given area. The range of users can be very extensive and comprises various labour market institutions and entities. In Poland, surveys of employees having specific skills can be conducted by analysing data on the working population according to the occupation criterion and using data possessed by the Central Statistical Office.

Considering assumptions made for Regional Labour Market Monitoring, the most useful data are derived from national censuses. It should be remembered, however, that such surveys are cyclical, and the intervals between them are quite long. Let us recall that the most recent national census took place in 2002 and the next one has been scheduled for 2011. Census data allow analysing the entire working population by so-called major occupational groups (10 categories) that can be further analysed by various cross-sections, such as sex, age, level of education, the section of national economy. Data on the skilled employees obtained from this source are very useful not only because their source is a complete survey, but also because of their disaggregatability. They are available not only for the country, but also for the regions (voivodeships). This source of data allows making international comparisons, because the category of employees is defined in line with the international standards. Employees can be monitored according to occupations distinguished in the International Standard Classification of Occupations ISCO-1988. Other census data can be used to calculate various indicators, such as the economic activity rate and the employment rate, or structural indicators for various cross-sections. The population of skilled employees can be therefore described using both absolute and relative measures.

The LFS data are also very useful and their usefulness arises from the high frequency of observations (quarterly). The population of skilled employees can be described using absolute numbers, but neither economic activity rates nor employment rates are calculated for individual occupational groups. Occupational cross-sections of employees are similar to those operated in national censuses and conform to the international statistics standards. However, the data cannot be disaggregated down to the level of regions, or even lower, to the poviats. For regional bodies such as local governments, educational institutions, or investors intending to start projects in specific voivodeships this group of information is not very helpful. It is worth stressing that the labour market policy in Poland is decentralised and that the interested parties have limited access to data that might help them make better diagnoses of the labour market situation with reference to occupations. This fact is especially consequential in the situation when considerable outflows of workers to foreign markets can be observed. Another key issue is identification of occupations that have been the most strongly affected by economic emigration. Reports on this subject are prepared by the placement agencies – as part of their reporting activity – that are authorized to render placement services abroad. However, economic emigration takes place also outside the institutionalised system of public or private placement services. The nationality criterion is not applied to describe the population of employees.

Regarding enterprises' reports, which are another source of data on skilled employees, the most informative are reports on labour demand. The survey is representative and it is conducted on a quarterly basis. The data it provides illustrate the size of the total demand for labour, which is defined using numbers of the skilled employees and the number of vacancies by occupation. This observation applies a different category of employees than that used by the national census or by the LFS. Its essence is not consistent with the

recommendations of international statistics, but skills and occupational qualifications are presented more specifically, according to 30 groups of occupations, which makes them incomparable with data derived from observations described above. The survey's results are not presented by area, but it is possible to analyse them in terms of the national economy sections and worker sex. They cannot be used to calculate rates.

Following the presentation of the skilled employee monitoring system, we can discuss some of its weak and strong points. The upside is the system's transparency and guaranteed regularity of observations of the described segment of the labour market. As for the weak points, they are more numerous. Many of them have already been mentioned during our discussion about data sources above. At this point, we will try to sort them out. Information about skilled employees comes from various sources and its scope is different, which prevents its interchangeable or complementary application. This is the result of certain definitional inconsistency that mainly affects the category of working population. Most statistical information about skilled employees is very general, because relevant information sitting at lower levels of the territorial division of the country, i.e. voivodships/regions and poviats, cannot be accessed. Enterprises' reports cannot be viewed as a complete survey, because the small-sized enterprises that contribute large part of jobs in local or regional labour markets are monitored to a limited degree.

### ***Conditions for Applying Solutions from Chapter 1***

- Labour market monitoring can be coordinated by accepting common information standards, definitions, and classes of variables. This is already being done and the process should be continued for various observations, mainly at the country level that can be treated as a region of Europe. In this case, the working population is described using various cross-sections, i.e. sex, age, level of education, sections of economy, occupations. However, data on nationalities and years of service are not available.
- The national data will have to be disaggregated in the future. Today it is not possible, because of insufficient representativeness of the observed entities. The representative sample should be extended, especially for the LFS, but this entails considerable costs.
- Efforts should be made to make data describing occupational traits more specific, for instance, skills, or the years of service. This is important for population involved in the agricultural sector and for the self-employed. Agriculture is restructuring and so special observation is needed. It is necessary to have information about the sector's qualification potential and primarily about the potential's structure. There is a complete lack of data on employees by nationality.
- To characterise the population of skilled employees the more available data on the level of education can be used. Statistical reporting operates the criterion of education that can help pick out the skilled employees. The following types of education can be applied to describe such employees: basic vocational, secondary vocational, secondary general, tertiary.
- It is more efficient to analyse skilled employees using absolute measures, i.e. their numbers (by occupation/level of education), than the relative measures, such as indicators and rates.

- Worth considering is the possibility of making monitoring more flexible, i.e. of having the option of reducing, or increasing the accuracy of observation depending on the labour market situation and on the needs declared by various institutions that are potential recipients of the data. For instance, this approach would be important for areas where the migratory processes are building up. National censuses account for the category of migrants the most widely, but migrants' socio-economic characteristics are insufficient. Migrants' skills are presented using data on their levels of education.

## Skilled Employees as a Target Group for Labour Policies – A German Perspective

*Markus Höhne / Carsten Kampe / Anja Walter*

### 1. Introduction

The Labour Ministry (MASGF) of Brandenburg State has been sponsoring the project “Regional Offices for Ensuring Sufficient Supplies of Skilled Employees” since January 2006. The project aims to counteract a potential shortage of skilled (and highly skilled) employees<sup>82</sup> with preventive targeted measures (forcing and supporting activities in ongoing education, cooperations and networks with schools and universities, among others). The company LASA Brandenburg GmbH, which is the services provider of Brandenburg State in the area of labour policy, was commissioned to implement this project. It is centred around the tasks of information, advisory services, awareness activities and networking on the topic of sufficient supplies of skilled employees. An essential element here is the so called Brandenburg skilled employment monitoring system. Here, data and information on current developments and important labour market and economic trends are collected continually and placed at the disposal of economic and company policy makers (such as networks, plant managers, personnel managers, organisations that offer training, and others). The project results confirm that skilled employees are a relevant target group for action oriented labour market policies. This monitoring system presents the initial situation in greater detail: quantitative labour market structure analyses should consider the entire spectrum of gainful employment so that they can cover substitution processes between various groups of the gainfully employed and thus notice qualification and dequalification trends. On the other hand, with qualitative surveys in selected regions and industrial sectors<sup>83</sup> it is expedient to design the analyses for individual groups of skilled employees.

In order to be able to show what can be contributed by the Brandenburg skilled employment monitoring system to the activities of labour policy on the subject of skilled employees and securing a sufficient supply thereof, this paper first describes, in section 2, the approaches and procedures of this system. Then section 3 goes into the subject of communicating these results. This is followed in section 4 by examination of the question of fields open to activity. Finally, in section 5, the experience and project results are assessed with the labour policy target group “skilled employees”.

### 2. Approaches and Procedures

The Brandenburg skilled employment monitoring system works at two levels. The first level comprises quantitative structural analyses of the labour market in Brandenburg State; these are carried out with the help of public and semi-public statistics. The second level represents qualitative analyses, i.e. company surveys. Both levels aim to supply to labour policy actors specific labour market information such as information about the current stock of and demand for persons under employment for which contributions to the social security system are required (“SV employment”) so that action oriented labour market strategies can be focused more precisely on emerging challenges. The labour market

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<sup>82</sup> The term “skilled employee” denotes any person who has completed any programme of vocational training or any programme of studies at an institute of higher education.

<sup>83</sup> An “industrial sector” can be any line of business whatsoever.

structure analyses consider both the NUTS 3 county level data (population data, school leaving data, persons employed per industrial sector, etc.) as well as the NUTS 1 state level data (commuter interdependencies, focus on industrial sectors, value creation chains). Company surveys focus on regional markets (regional growth cores, counties and localities) or on structures of industrial sectors.

## ***2.1 Innovative Labour Market Structure Analyses as a Labour Market Policy Instrument***

The quantitative labour market structural analyses are ultimately based on the jobs and professions classification system of the Federal Labour Agency. Since we present the qualifications profile for each vocational group<sup>84</sup>, it is possible to make the analyses more precise for selected groups of skilled employees. Since qualifications trends, requirements and demand should also be covered, it would not make sense to limit the structural analyses themselves to groups of skilled employees. The labour market structural analyses are centred around the topics of SV employment and unemployment for each vocation. Our monitoring of vocations takes account of the following aspects:

### *Employment Structure for each Vocation*

- Age structure of the employed per vocation by age groups and gender as an indicator of the retirement rates to be expected.
- Qualification structure of the employed per vocation by age groups as an indicator of requirements for training and advanced qualification / ongoing training for each vocation.
- Part time employment per vocation as a vocation dependent structural attribute and indicator of creative leeway in respect to working hours.
- Employment figures per vocation by industrial sector (WZ 3 places) as an indicator of the relevance of vocation dependent developments for each industrial sector.

### *Unemployment Structure for each Vocation*

- Age structure of those looking for work in each vocation by gender as an essential indicator of vocation dependent supplies of skilled employees.
- Qualifications structure of the unemployed in each vocation by age groups and gender as an indicator of the development potential of vocation specific supply of skilled employees.
- Duration of unemployment for each vocation by age groups and gender as a structural attribute of vocation specific labour supplies.

### *Comparison of Labour Supply and Demand for each Vocation*

- Presentation of the number of registered vacancies per unemployed person over time as an essential indicator of emerging shortages of skilled employees.

### *Numbers of Persons in Training and Training Capacities by Qualification and Vocation*

- Numbers of persons in training by gender as an indicator of medium term supplies of skilled employees

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<sup>84</sup>

A distinction is drawn between persons without a completed course of vocational training or studies, those with completed vocational training and those with a degree from an institute of higher learning.

- Development of school leaving figures by type of certificate as an indicator that describes potential supplies of skilled employees.

By crossing vocation (base: SV employment statistics) and industrial sector (base: classification of the line of business – currently WZ 03) it is possible to show in a second step which target vocations are in demand to what extent in which industrial sectors. Extending the view of each vocation to include an analysis per industrial sector provides insight into the relevance of developments in each vocation for each industrial sector. This combination of the views of the vocations and the industrial sectors represents an original added value for regional monitoring projects. On the one hand it allows policies to react preventively to emerging shortages of skilled employees in given vocations.<sup>85</sup> On the other hand, information on employment structures within a given industrial sector provides the option of targeted (even political) influence and support within company networks and structures of the industrial sectors. The major focus is on the following fields of action:

- Early vocational orientation,
- Qualitative and quantitative aspects of initial training,
- Subsidized qualification of employed persons,
- Qualification of the unemployed in accordance with demand,
- Improvement of cooperation between science and business,
- Support of new settlements and existing companies.

## ***2.2 Company Surveys: an Instrument of Active Labour Market Policies***

Labour market structural analyses must be supplemented by qualitative studies (company surveys) in every case because this is the only way in which the developments within the region being studied can be evaluated in respect to their actual contents in order to assess future developments and demands for skilled employees. Only the actors on location who are affected can answer the questions of the significance to be attached to specific labour market trends, of the potential for crisis inherent in certain given developments and of the actual needs for action. Thus, for example, the extent to which retirement leads to demand for replacement is an open question, as well as that of whether vacancies are being refilled in order to restructure operational processes.

In view of the complexity of the subject matter, the company surveys should first be conducted in the form of qualitative interviews, for it is extremely difficult, if not impossible, to design questionnaires<sup>86</sup> that deliver proper answers to questions such as, for example, those of which technical and organisational developments are emerging in which segments of the industrial sectors being studied and which newly developed qualifications and requirements for competencies are arising from which changes.

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<sup>85</sup> Since part time markets due to technical and organisational changes are characterised by high developmental dynamics, it is necessary to conduct these structural analyses on a regular basis so that developments within an industrial sector are reported in a timely fashion. Regional labour market analyses smooth the data collected to provide a decisive basis for effective labour policy actions aimed at ensuring that there are sufficient supplies of skilled employees in future.

<sup>86</sup> An effort should also be made to smooth the data in the area of qualitative analyses. Leaps in developments and reversals of trends can only be ascertained when there is a regular dialogue with companies and insiders. The optimal solution is probably a regular company survey (panel interview). Being able to repeatedly ask about core relationships and to supplement these determinations with questions about differing major topics would be comparable to the concept of the IAB company panel.

A basic objective of such company surveys is that of identifying specific needs to take action in the companies being studied and to accommodate these needs as far as possible. Given a network of labour market actors who can take action, it is possible to fill job vacancies and training vacancies on short notice or even to initiate training and qualification activities in accordance with actual needs, possibly through the Federal Labour Agency or in the context of support programmes of the state governments. Since it is a question here of specific labour policy actions, it is indispensable for one to be able to distinguish between analysis views of selected groups of skilled employees: tailor made provision of further training can only be planned and implemented if company needs are known in sufficient detail and can be matched up with the current labour supply. Undifferentiated analyses are not in a position to justify subsidies of employment that are right on target.

The experience of the project “Regional Offices for Ensuring Sufficient Supplies of Skilled Employees” shows that studies of demand for skilled employees are in a position to support existent structures or even to (re)activate them. The willingness of companies to take initiatives in personnel policies rises in the context of supplying skilled employees: thus, among other things, coordination processes with the Federal Labour Agency are intensified and, despite previous doubts, apprenticeships are even created or advertised again. Company survey of demand for skilled employees can act as an instrument of labour policy when they are embedded in a broadly designed labour and business strategy and supported by important actors in the labour market and the various sectors of industry and other lines of business.

### **3. Communication of the Results**

User oriented communication of monitoring results is a decisive determinant of the success and long lasting establishment of regional monitoring projects. The leeway available to decision makers can only be exploited efficiently and in a timely fashion when the subject matter studied will be transparent and feedback to the previously identified actors will be ensured. In the case of the Brandenburg skilled employment monitoring system results are communicated through two different channels. There is direct communication in the context of work meetings of regional actors, congresses and workshops for a given industrial sector on the topic of ensuring sufficient supplies of skilled employees, at which members of the project “Regional Offices for Ensuring Sufficient Supplies of Skilled Employees”<sup>87</sup> report on results and the current state of skilled employment monitoring. This intensive mode of communication ensures that the analysis results will be used in the regional labour markets. Moreover, these direct exchanges also make it possible to win over further partners for monitoring.

Beyond that, in February 2008 LASA Brandenburg GmbH introduced a comprehensive offer of information on the skilled employment situation in Brandenburg State. This Skilled Employment Information System (FIS) is web based, available to the public and can be used free of charge ([www.fachkraefte-brandenburg.de](http://www.fachkraefte-brandenburg.de)). This system aims to represent structural data on regional as well as industrial sector oriented and vocation oriented developments of the skilled employment situation in Brandenburg State. The above mentioned topics of SV employment and unemployment are focal points of this portal. Users can also find information from the areas of opinion surveys and prognoses as well

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The entire project has six regional offices in Brandenburg.



as information on Brandenburg's industrial sectors of the future (industrial sector competence fields) and on Brandenburg's regional growth cores.

The data presentation of the Brandenburg Skilled Employment Information System (FIS) is being refined continually to allow derivation of definite actions under a labour policy which shapes the future (such as on target subsidies of early vocational orientation and support of companies regarding personnel development). This also includes expansion of the spectrum of the vocations that are studied as well as the options granted to external users for access to basic data and combinations thereof in accordance with the user's interests. The skilled employment information system also posts notices of anticipated acute or medium term demand for skilled employees. This system provides the State of Brandenburg's labour policies with a solid basis for taking labour policy initiatives that can be planned and that ensure that there are sufficient supplies of skilled employees.

#### **4. Prospects for Combining Quantitative and Qualitative Results to Predict Requirements for Skilled Workers**

A fundamental objective of action oriented monitoring of skilled employment is that of providing the labour policy actors with development forecasts on the basis of which preventive measures and initiatives regarding possible future shortages of skilled employees can be taken. To work out the regional development potential of the coming 12 to 36 months it is absolutely necessary to develop model based scenarios<sup>88</sup> in addition to descriptive and interpretative presentations of analysis results. Regional and industrial sector specific development determinants that are of decisive importance for growth potentials of the industrial sectors in question can be identified on the basis of quantitative structural analysis and qualitative company surveys.<sup>89</sup> When the factors of an economic region that determine development are known, then, for example, it is also possible to work out econometric prediction models with the help of mathematical procedures. By varying within the prediction model the factors that have been identified as influential, it is then possible to compute alternative development scenarios which, on the one hand, delimit the horizon of what is possible, and on the other hand, also give indications of which effects have structural changes on the development of the business and labour market. Such projections aim to identify possibilities for development that lie outside the subjective assessments of plant managers and industrial sector insiders and thus indicate possible trends and potential shortages in the given industrial sector that have not yet been perceived as being central within the relevant area of the economy. Thus analytic mathematical prediction models provide a sustained increase in the capacity and accuracy of predictions of demand for skilled employees.

Beyond that, the model based predictions can be reflected back into the region with subsequent company surveys in that these refer to problems and action areas that are relevant to the analysis and form the basis for substantive discussions with industrial sector insiders to open up the possibility of mirroring expert opinions and thus making better assessments. Conversely, projections of demand for skilled employees must fall back on the assessment of industrial sector experts so that a judgment can be formed of

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<sup>88</sup> Cf. Schnur, Peter/Zika, Gerd (2005): Projection of Demand for Labour until 2020: only hesitant improvements in the German labour market, IAB short report 12/2005.

<sup>89</sup> The empirical basis can be extended beyond the results of the underlying survey by falling back on company specific microdata such as found in the monthly company surveys conducted by the statistics office for the states of Brandenburg and Berlin.

which development trends will be realised to what extent and how such developments should to be taken account of in the prediction model.

Given the specifics of the target groups, initial experience shows that econometric models come up against limits to differentiations. Thus while the development of employment within the target industrial sector can be estimated. These models are only capable of vocation specific differentiations to a limited extend. However, with discussions of the results with industrial sector insiders there is a need for being definite in order to judge the contents of the scenarios and to be able to judge what qualitative changes lie behind the predictions.

## **5. Conclusion**

Preventive measures and initiatives for avoiding potential shortages of skilled employees are coming more and more into the focus of the labour policy actors. The project "Regional Offices for Ensuring Sufficient Supplies of Skilled Employees" and the "Brandenburg Skilled Employment Monitoring" contained therein, which have been initiated by the labour ministry of Brandenburg State, presents concrete examples for action oriented, target groups specific labour policies. A differentiated and thus action relevant picture of the skilled employment situation can be achieved by combining various analysis methods: statistic evaluations, company surveys and econometric models. Beyond that, the methods mix also makes it possible to accommodate both the information needs of labour policy actors as well as the needs of companies and (prospective) employees in particular. Labour market and structure data of the economy are of special significance for labour policy. They offer the relevant actors a way to identify areas in which initiatives for ensuring sufficient supplies of skilled employees should be taken. The experience gathered in the project shows that focussing on the target group of skilled employees is indispensable if the analyses are to initiate definite labour policy actions. Action oriented monitoring specific to target groups can develop its effects in full when it is embedded in a regional or industrial sector network which has been set up broadly and coordinated with the state's strategy for business and labour policies.

### **III. Relationship between Target Group Monitoring and Industry Monitoring**

#### **Introduction**

Target group monitoring and branch monitoring take place, at first glance, at conceptually different entrance points. Experience with the application of regional labour market monitoring shows that often distinct user groups should be served. While the one is interested primarily in branch-specific information, the other needs exclusively information on one or more specific target groups. This requires the need to connect branch and target group monitoring with each other. In this section, two cases are presented in which just such a connection at the level of the data succeeded.

Jan Ulatowski starts with how a regional labour market monitoring system was created in Mecklenburg-Western Pomerania in Germany. In this system, the branches considered to be of core importance for the region are emphasized. Within the selected branches single professions and their qualification profiles were incorporated. Jan Ulatowski evaluates the usability of public data for the depiction of this specific target group. He elucidates the possibilities of this data and the limits thereof. Roland Bieräugel and Marco Mevius take up another starting position in their contribution. They take information from a regional monitoring of the health and elderly care labour market and show how this can be made available for two separate user groups over a web-based information platform. One user group requires branch information and the other group aims at the single professions. Roland Bieräugel and Marco Mevius offer the technical solution to allow both groups to have concurrent access to the data.

In both contributions the qualification-based target groups are mustered. It can be assumed that the solutions given here can also be transferred to other socio-culturally defined target groups.

## **Access via Data on Branches and on Target Groups - Experiences of Regional Labour Market Monitoring in Mecklenburg-Western Pomerania**

*Jan Ulatowski*

### **1. Implementation of a Labour Market Monitoring System for Mecklenburg-Western Pomerania**

#### **1.1 Starting Point**

In January 2007 TGS *Company for Structure Development and Labour Market* launched the project “Implementation of a Regional Labour Market Monitoring System for Mecklenburg-Western Pomerania”.<sup>90</sup> The initial point for the project was the unfavourable demographic framework situation in conjunction with the current positive economic development in the state. Both factors lead to the fact that securing manpower requirements – particularly in enterprises in growth sectors – is increasingly difficult to arrange. This is where the labour market monitoring system comes in.

The goal of the project is the expansion of the information base in Mecklenburg-Western Pomerania through the development and implementation of a regional labour market monitoring system for early detection of manpower needs and short-term qualification requirements in the enterprises. In the pilot phase, the labour market monitoring system concentrates on certain main sectors, which thanks to their growth potentials assume a high degree of importance for the regional economy and are also affected to a great extent by manpower bottlenecks as a result of constantly newly emerging qualification requirements. For this reason the analyses and forecasts initially concern typical professions and sectors of the metal and electrical industry. Mecklenburg-Western Pomerania’s automotive supply industry was the main focus of the first study.

#### **1.2 Main Tasks**

The main tasks of the labour market monitoring system are the expansion of the information base, the preparation of current data analyses based on secondary statistical data, the preparation of forecasts in the form of industry reports, the interpretation and communication of results as well as the formulation of action recommendations.

#### *Expansion of the Information Base*

The main data sources of the labour market monitoring system in Mecklenburg-Western Pomerania are the semi-annual company surveys within the selected industry. They consist of personal guided interviews as well as surveys with the help of questionnaires. Furthermore, detailed special evaluations from the German Federal Labour Office with regard to the labour market situation in the sector-typical industries and professions

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<sup>90</sup> The project is supported financially by the Mecklenburg-Western Pomerania’s Economics Ministry, the European Union and the Otto Brenner Foundation. Idealistic partners are the employers’ association NORDMETALL, the industrial union IG Metall Küste as well as the German Federal Labour Office.

contribute substantially to the survey of the data basis for the labour market monitoring system. They constitute the basis for the regular current data & time series analyses.

### *Preparation of Current Data Analyses*

Regular current data analyses show the current labour market situation in the metal and electrical industry in Mecklenburg-Western Pomerania. These analyses are based on secondary statistical data that are sorted according to various characteristics (labour office district, sex, age, qualification, short-time work, length of unemployment, etc.) and presented in relation to sector-typical professions. As a result, concrete statements regarding the structure of the workforce or the unemployed can be made, which in turn allow conclusions to be drawn about the demand for certain professions or the manpower supply.

### *Preparation of Forecasts*

The preparation of semi-annual forecasts is planned to estimate future manpower, skilled labour or qualification requirements as well as possible short-term and medium-term bottlenecks in the enterprises. The results of the semi-annual company surveys, as well as time series analyses based on current data evaluations, are utilised for this purpose.

### *Preparation of Action Recommendations*

A crucial task of labour market monitoring for Mecklenburg-Western Pomerania is the user-oriented preparation of the analyses and forecasts as well as the provision and communication of results. At the same time, the formulation of appropriate action recommendations is particularly relevant.

The participation of an advisory council – which consists, amongst others, of members from the social partner bodies, representatives of the economics ministry and other partners – is also important.

## **2. The Influence of the Initial Results on Connecting Industry Monitoring with Target Group Monitoring**

### ***2.1 Results of First Sector Analyses - Automotive***

As mentioned before, the project's focus was primarily in the preparation of sector-specific prognoses based on company surveys. Mecklenburg-Western Pomerania's automotive supply industry was the focal point of the first examination. The questions in the interviews and questionnaires were aimed at describing the employment trend inside the polled companies. The questions asked considered the following points:

- age and qualification structure inside the companies,
- industrial education (number of apprentices, professions, difficulties in staffing etc.),
- employment trend during the last 12 months,
- companies' strategies for securing the manpower requirements,
- personnel recruitment instruments,
- current number of vacancies (positions/professions involved),
- difficulties in staffing vacancies (positions/professions involved, time of vacancy, current bottlenecks etc.),

- short- and medium-term planning of the companies (manpower required, expected difficulties in filling staffing vacancies).

The answers given showed that the problems some companies had with staffing vacancies mainly concerned two types of specialists. For example: of 44 vacancies announced by the companies at that point in time, 23 were related to CNC specialists. 22 of these vacancies for CNC specialists had been vacant for more than 7 months. Companies described a similar situation as regarded the category of engineers.

Next, CNC specialists and engineers became of particular interest for the analysis due to the fact that there is obviously a staffing problem concerning these professional groups within Mecklenburg-Western Pomerania's metal and electrical industry, especially in the automotive supply industry. The necessity to monitor the above-mentioned professional groups by analysing labour market statistics became apparent since the companies' statements did not provide adequate information about the reasons for the situation described. However, the latter is an important question. In fact there are a lot of possible reasons to be considered. A manpower shortage in the companies does not automatically mean a general (quantitative or qualitative) shortage. Those mismatches can also be affected by information deficits on the part of companies or the labour administration (lack of information concerning job offers), by area mismatches (due to lack of mobility) as well as by different expectations between employers and job applicants as to the working conditions.<sup>91</sup>

In order not only to describe staffing problems and manpower shortages in the companies but also to be able to identify the causes of the difficulties, it was decided to have a special focus on selective specialists and to monitor their labour market situation considering several different characteristics.

## **2.2 Results of Initial Current Data Analyses**

Initial current data analyses based on secondary statistical data from the German Federal Labour Office provided a more general overview of the labour market development in the different sectors of the metal and electrical industry. They described the employment situation (development of employment; age and qualification structure of the employees etc.) as well as the numerical development of job offers inside the sectors. Besides this, they contained occupation-related analyses. These provided a rough overview of employment trends as regarded the typical metal and electrical professions.

The first results showed that it would be worthwhile analysing certain professional groups in more detail due to their dynamic development on the labour market.

Figure 1 exemplifies a couple of professional groups that are characterised by an enormous decrease in unemployment in conjunction with an increasing or stagnating number of job offers between January 2005 and January 2008. In particular, engineers, millwrights, pipe men and metal cutters were concerned. Assuming that this development continues, then a shortage of manpower as to these specialists will certainly occur in the near future. Consequently, the need for deeper studies into these professional groups became apparent.

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<sup>91</sup> Cf. Dietz M., Walwei U., IAB Institut für Arbeitsmarkt- und Berufsforschung: Fachkräftebedarf der Wirtschaft, Wissenschaftliche Befunde und Forschungsperspektiven, 2007, p. 2.

Figure 1: Changes in relationship between numbers of unemployed persons and job offers in Mecklenburg-Western Pomerania (selective professions), January 05 – January 08

Professional Group	Unemployed Persons		Job Offers		Relation "Unemployed Persons per One Job Offer"	
	Jan. 05	Jan. 08	Jan. 05	Jan. 08	Jan. 05	Jan. 08
Turner	246	110	20	40	12,30	2,75
Cutter	59	18	4	13	14,75	1,38
Welder	659	383	42	128	15,69	2,99
Tubular Installer	3.075	677	39	148	78,85	4,57
Pipe Man	382	179	8	92	47,75	1,95
Millwright	809	431	8	89	101,13	4,84
Electrician	2.307	829	106	263	21,76	3,15
Mechanical Engineer	542	197	42	40	12,90	4,93
Electrical Engineer	300	97	3	15	100,00	6,47

Source: German Federal Labour Office (Bundesagentur für Arbeit), calculation by TGS

Bearing in mind the above-mentioned results and trying to compile more demand- and user-oriented reports, the current data analyses changed more and more into target group analyses. That means that current data analyses concentrate increasingly on selected professional groups that are defined by the project's initiators (Ministry for Economics, Employment and Tourism, social partners), the results of the industry monitoring as well as the results of the initial current data analyses. The selected professional groups are to be analysed regularly with regard to the following parameters:

- development of employment (in Mecklenburg-Western Pomerania and the regions),
- development of the employees' age structure,
- development of number of vacancies (in the different sectors and regions),
- development of unemployment (in Mecklenburg-Western Pomerania and the regions),
- development of unemployed persons' age structure and duration of unemployment,
- etc.

### 2.3 Connection of Industry Monitoring and Target Group Monitoring

As the above paragraphs show, target group monitoring can act as a part of regional labour market or industrial monitoring. While TGS's industry monitoring generates current, short-term, regular and prognostic information about the employment situation in a certain industry (in that case the automotive supply industry), target group monitoring watches the labour market situation of those groups of persons that somehow take a special position in the labour market in general or particularly in the industry analysed.<sup>92</sup> Without paying special attention to those person groups, industry monitoring will have a more general and one-sided character. Considering analyses of the labour market situation of selective groups of persons, industry monitoring reports can give a comprehensive review of where there is urgent need for action.

<sup>92</sup>

Cf. Mathejczyk W., Institut für Wirtschaft, Arbeit und Kultur: Zielgruppenmonitoring zur Erfassung der Arbeitsmarktlage von Migrantinnen und Migranten – Grundzüge des Konzepts, presentation of 02.06.2008.

### **3. Access to Data on Branches and on Target Groups**

A prerequisite for the TGS's industry prognoses and the analyses of the labour market situation with regard to selective groups of skilled employees within the project is the expansion of the information base. The data sources used can be divided into primary and secondary data sources. The semi-annual company surveys within a certain industry belong to the primary data sources. These surveys consist of personal guided interviews, as well as surveys with the help of questionnaires. Data delivered by the German Federal Labour Office or the Federal Statistics Agency rank among the secondary data sources.

#### ***3.1 Challenges with Providing Data Concerning a Certain Industry Sector***

The German Federal Labour Office and the Federal Statistics Agency provide sector-specific data according to industrial sectors defined in WZ2003 (sectoral classification as at 2003)<sup>93</sup>. Among others they offer following statistics:

- number of employees by industrial sector, region and professional order,
- number of employees by industrial sector, region, age and qualification (fee-based),
- number of vacancies by industrial sector, region and professional class,
- economic indicators (turnover, volume of imports and exports, etc.).

However, in the case of TGS's survey within the automotive supply industry those statistics cannot be used due to the fact that the automotive supply companies are spread among different industry sectors. They range between the vehicle manufacturing sector, the electronics sector and the plastics moulding sector. Therefore, the company surveys are the only reliable data source to be used. The latter example can be adopted for many other specific industries and shows the need for TGS to carry out its own investigations within the scope of industry monitoring.

Carrying out its own investigations implies new challenges in turn. On the one hand, there can be problems such as the absence of cooperation on the part of the companies. On the other hand, companies' answers and statements – especially if talking about the labour market situation of skilled employees – can be too one-sided or imprecise. Here again, if possible, surveys need to be supplemented by objective and official statistical data. Useful occupational statistics are provided by the German Federal Labour Office.

#### ***3.2 Challenges with Providing Data in Regard to Certain Professional Groups***

Among other things, the German Federal Labour Office offers the following occupational statistics free of charge:

- number of employees by professional orders and regions,
- number of unemployed persons by professional classes and regions,
- number of vacancies by professional classes and regions.

These statistics are useful to amend industry monitoring reports by adding general statements concerning the labour market development of selective professional groups. However, in order to analyse in detail the situation of specialists that take a special position in the labour market or in a certain sector, advanced and differentiated statistics are needed. These statistics must consider several characteristics (e.g. age structure, duration of unemployment etc.) and combine them. Furthermore, occupational statistics

<sup>93</sup> in 2008 an updated version comes into effect (WZ2008).



have to be broken down not only into the professional groups but into individual professions. In this respect, there are four main challenges:

1. Only unemployment and vacancy statistics can be broken down into individual professions. Employment statistics cannot be differentiated in that way.
2. Statistics considering additional characteristics have to be generated individually by the German Federal Labour Office and must be paid for.
3. The outdated occupational classification used for providing labour market statistics impedes accurate statements about relevant professional groups.
4. Statistics about the number of vacancies cover only those vacancies that are notified to the German Federal Labour Office.

### *Employment Statistics by Professions*

Employment statistics cannot be broken down into individual professions. For technical reasons those statistics are provided only on the level of professional orders. These orders contain a couple of different professional classes and plenty of individual professions.<sup>94</sup> When analysing the labour market situation as regards a concrete profession this may pose a problem because it is impossible to compare the number of unemployed persons and vacancies with the stock of employees for the appropriate profession. Even if one knows the number of employees according to a professional order, it is not possible to find out how the employees are divided onto the subsumed professional classes or professions.<sup>95</sup>

Perhaps the above-mentioned problem will be solved when the new occupational classification comes into effect in 2010. Then it still will not be possible to generate employment statistics for the individual professional classes or professions, but perhaps the individual professions will be summarised in classes, orders and groups that are adapted to the new requirements and that allow for sustainable analyses.

### *Individually Programmed Statistics*

As described before, statistics offered by the German Federal Labour Office which are free of charge are limited as to their degree of differentiation. However, the generation of meaningful monitoring reports with reference to selective professional orders requires the consideration and combination of further characteristics (e. g. age structure, duration of unemployment). Those statistics are available at the German Federal Labour Office, but they have to be generated individually and must be paid for.

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<sup>94</sup> The current occupational classification used by the German Federal Labour Office consists of 4 differentiation levels. First there are the individual professions. They are labelled with a seven-digit documentation number. These individual professions are summarised into professional classes (four-digit code). The professional classes are again summarised into professional orders (triple-digit code) which again go together to form professional groups (two-digit code).

<sup>95</sup> In case of the engineers this problem is negligible. The individual engineering professions are summarised into practicable orders that are suitable for analysing the engineers' labour market situation taking into account the unemployed engineers and vacancies for these specialists.

Figure 2: Example for individually generated statistics with combined characteristics: unemployed persons by professional order, age, duration of unemployment, labour office district and sex

May 2008		Labour Office District: Neubrandenburg							
profession	age	duration of unemployment							
		< 3 months		3 - 6 months		6 - 12 months		permanently unemployed	
		male	female	male	female	male	female	male	female
682 salesmen	< 25 years	71	152	31	52	13	24	*	6
	25 - 34 years	26	130	21	116	18	129	31	182
	35 - 44 years	12	139	13	106	11	119	26	292
	45 - 54 years	17	155	16	140	12	141	26	478
	> 55 years	8	60	4	38	4	37	13	195
	sum	134	636	85	452	58	450	98	1.153

Source: German Federal Labour Office (Bundesagentur für Arbeit)

Programming those individual statistics queries is the most cost-intensive part. The follow-up costs for delivering statistics regularly (monthly/quarterly) amount to only a fraction of the programming costs. This means that if individual statistics queries have been programmed once, the appropriate data can be generated regularly for much lower charges. Figure 2 shows an example for what is possible in terms of generating labour market statistics about selective professional orders.

Amongst other things, the TGS uses the following statistics for an effective monitoring of skilled people that take an important position in Mecklenburg-Western Pomerania's labour market (characteristics are combined with each other):

- number of employees by professional order, region, age, qualification and sex,
- number of employees by professional order, industry sector and region,
- number of employees working short-time by industry sector,
- number of temporary workers by professional order,
- number of unemployed persons by professional order, region, age, duration of unemployment and sex,
- number of vacancies by professional order, industry sector and region.

Some of the above statistics were delivered in the form of time-series. This allows not only the development of (un-)employment to be analysed but also the development of the age and qualification structure among the employees to be studied, as well as the development of the age structure and the duration of unemployment among the jobless persons. The latter, for instance, is quite important for judging the actual number of available workers.

#### *Labour Market Statistics Based on an Alternative Occupational Classification*

As mentioned in 3.2 the German Federal Labour Office offers different occupational labour market statistics concerning the unemployment and vacancies on the level of occupational classes and orders. In terms of many metal and electrical professions this is much too imprecise due to the fact that the professional classes mostly consist of many different individual professions. Consequently there are two problems. Firstly, some occupational classes subsume individual professions that (for different reasons and in respect of content) do not really fit together.<sup>96,97</sup> Secondly, it is not possible to find out how the given number of unemployed persons or vacancies divides into the individual professions.

<sup>96</sup>

E.g. in some cases professional classes contain individual professions that are out of date.

Now one solution could be to order labour market statistics for selective individual professions at the German Federal Labour Office. However, this is again associated with costs. In addition, this approach is not an option for regions like Mecklenburg-Western-Pomerania. Falling numbers in the statistics resulting from the low industry density do not allow for high differentiations for data security reasons.

A second solution, the one chosen by TGS, is to select individual occupations with comparable work descriptions and combine them into alternative occupational groups for which the German Federal Labour Office then develops new statistical models.

*Example: Milling Machine Operator*

The Milling Machine Operator is a profession with 4 available specialisations: 1. Lathe Systems Operator, 2. Milling Machine Systems Operator, 3. Automatic Screw Machine Systems Operator and 4. Grinding Machine Systems Operator. Until 2004 each of these specialisations was treated as a separate profession. Although these professions were very similar – which in 2004 led to the point where they were subsumed under the profession “Milling Machine Operator” – they were provided in different professional classes or even different professional groups. Until now, the German Federal Labour Office has put these individual professions in different professional classes (see fig. 3 and 4).

Due to the similarity of the above professions/specialisations and due to TGS’s experience which shows that companies from the automotive supply industry searching for CNC specialists do not really care about the applicants’ specialisations, TGS summarised them in the alternative professional group “CNC specialists” together with further similar CNC professions. Now the German Federal Labour Office provides individual programmed labour market statistics for this and other “new” groups regularly and retroactively. That gives the opportunity to present a realistic view of the actual number of vacancies and unemployed persons (labour supply) for appropriate specialists.

**Fig. 3: Example for alternative professional group “CNC-Specialists”**

Code	CNC-Specialists
2211103	Milling Machine Operator
2211100	Milling Machine Operator - Turning Machinist
2212101	Milling Machine Operator - Automatic Turning Machinist
2221101	Milling Machine Operator - Milling Machinist
2251103	Milling Machine Operator - Grinding Machinist
2251104	Milling Machine Operator - Grinding Machine Operator
2220100	CNC Milling Cutter
2210100	CNC Turner
2250100	CNC Grinder
2240101	CNC Driller

Source: own illustration

**Fig. 4: Occupational classification of the German Labour Office**

code	Professional groups, orders and classes
22	Metal Shaper (cutting)
221	Turner
2210	Turner (general)
2211	Turner (iron and metal)
2212	Revolver Turner
...	...
222	Moulding Cutter
2220	Moulding Cutter (general)
2221	Universal Moulding Cutter
...	...
224	Driller
2240	Driller (general)
...	...
225	Metal Grinder
2250	Metal Grinder (general)
2251	Universal Metal Grinder
...	...

Source: German Labour Office

### *Statistics about the Stock of Vacancies*

Statistics as to the stock of vacancies cover only those vacancies that are notified to the German Federal Labour Office. Consequently, the actual number of vacancies for certain professional groups or industry sectors is not quantifiable clearly.

## **4. Conclusions and Perspectives**

Monitoring certain industry sectors or target groups (in this case: skilled persons) is connected very closely. Monitoring reports on selective industry sectors that are based solely on company surveys and general sector-related statistics can be too imprecise and one-sided if the exact labour market situation of person groups with a special position in that appropriate sector is not considered. Only by monitoring branches AND certain target groups can one make concrete statements as to skilled personnel demand and supply. Of course, the target groups to be examined can change over time and vary between the different industry sectors.

The access to appropriate data is limited and often connected with costs. An outdated occupational classification which currently is the basis for generating labour market statistics impedes detailed analyses. The expected changes in the occupational or sectoral classification can be seen as a chance to get more significant and practicable labour market statistics in the future. On the other hand these changes can make time series analyses more difficult.

Accepting the costs for generating highly differentiated, individual labour market statistics, one can gain a precise description of what the labour market situation looks like for certain person groups in certain branches at this stage, despite the problems mentioned. It is the TGS' project's objective to generate a data base that allows for detailed analyses concerning skilled personnel demand and supply and to make these data available for all interested parties.

## Challenges for Web-Based Regional Labour Market Monitoring Systems

*Roland Bieräugel / Marco Mevius*

### 1. Introduction

Up to now, regional labour market monitoring concentrated mainly on branches where certain industry sectors with particular importance for regional development were observed and analysed. Furthermore, there is an increasing demand for information about individual problem groups (e.g. migrants and long-term unemployed people) having difficulties to integrate into the labour market. A combination of branch and target group monitoring has rarely been applied so far. However, actors in politics and administration who want to implement the adequate general conditions essential for an efficient labour market, often depend on differentiated information about branches and target groups. This approach is caused by the fact that there are different groups of employees within one branch, whose situation (concerning their labour market position and occupational qualification) is often different. As a consequence, other approaches must be developed to enhance the integration of each target group within the economic sector.

An integrated perspective on branches and target groups includes difficulties on all three levels of the regional labour market monitoring concept: information, communication and action. At this anthology the problems for the first level were demonstrated by Jan Ulatowski in his article 'Access via Data on Branches and on Target Groups – Experiences in Regional Labour Market Monitoring in Mecklenburg-Western Pomerania'. Whilst Ulatowski worked on the problem of the availability of differentiated statistical data as well as preparation of this data, required for an integrated monitoring, the present contribution focuses on the particular challenges for the development and implementation of a web-based information system by means of the project 'Hessischer Pflegemonitor', a continuous observation of the labour market for elderly care and health care employees in the federal state of Hesse.

The remainder of this contribution is structured as follows. The project 'Hessischer Pflegemonitor' is briefly outlined in chapter 2, with special focus on the main tasks and challenges for the web-based census and presentation of the information required for an integrated monitoring of branches and target groups. Chapter 3 demonstrates the technological transformation of these problems. Initial experiences of the platform users are presented in chapter 4. Finally, in chapter 5 the contribution concludes with a short summary of the presented approach and a brief outlook.

### 2. Challenges of the Project 'Hessischer Pflegemonitor'

Against the background of demographic changes and an increasing female employment rate the current and prospective maintenance of qualified elderly care and nursing becomes more and more a matter of urgency. It is the task of a responsible policy to ensure a sufficient supply of nursing staff with adequate qualification to handle the current and future care demand.

Therefore, in 2006 the Hessian Ministry of Social Affairs launched the project 'Hessischer Pflegemonitor', a continuous observation and analysis of Hessian care labour market, in order to plan and operate elderly care and nursing in Hesse with regard to the future development of this area. In order to collect short-termed data about the supply and

demand of elderly care and healthcare workers and to provide the analysed results to all actors in an adequate, prompt and simple way, the Ministry decided for a web-based collection and presentation of information. The Institute of Economy, Labour and Culture (IWAK) at the Goethe-University of Frankfurt is responsible for the analyses of the contents, whereas the Research Center for Information Technology (FZI) in Karlsruhe is responsible for the technical acquisition, processing and presentation of information.<sup>98</sup>

Since the labour market of care workers consists of the branches health care and elderly care, information about supply and demand in both branches are necessary to accomplish valid analyses of current and prospective developments in the aggregate care labour market of Hesse. Furthermore, the supply and demand data must be differentiated into specific employment groups and qualification degrees, e.g. registered elderly care nurse with and without further education, care assistants and low-skilled employees. This differentiation characterises the 'Hessischer Pflegemonitor' as an integrated labour market monitoring system composed of branch and target group monitoring. Figure 1 provides an overview about the individual branches, professions and skill levels the 'Hessischer Pflegemonitor' has to handle with.

Figure 1: Branches, target groups and skill levels at the 'Hessischer Pflegemonitor'

Skill levels	Elderly care professions	Health care professions
6.	elderly care worker with final degree	health care worker with final degree
5.	3 year skilled elderly care worker with further education	3 year skilled health care worker with further education
4.	3 year skilled elderly care worker with additional qualification	3 year skilled health care worker with additional qualification
3.	3 year skilled elderly care worker	3 year skilled health care worker
2.	1 year skilled elderly care worker	1 year skilled health care worker
1.	low-skilled and semi-skilled elderly care worker	low-skilled and semi-skilled health care worker

Institutions from different areas of the care system of Hesse had to be considered for both acquisition and communication in order to model these branches and target groups in the monitoring concept of the 'Hessischer Pflegemonitor'. Altogether, there are four different sectors of care providers and four different sectors of training posts:

<sup>98</sup> At [www.hessischer-pflegemonitor.de](http://www.hessischer-pflegemonitor.de) you will find the completed web-based Information System 'Hessischer Pflegemonitor', showing all results of the analysis of the care labour market realised in 2007.

Figure 2: Relevant sectors for the 'Hessischer Pflegemonitor'

No.	Care Providers	Training Posts
1	Old Peoples' Homes	Elderly Care Schools
2	Ambulant Nursing Services	Nursing Schools
3	Hospitals	Institutions of further Education
4	Rehab Clinics	Colleges

For valid results there is no other way than to survey all institutions of the eight sectors. For this reason, eight different interactive questionnaires had to be developed and sent to all institutions.

To support the project an advisory board has been established, consisting of representatives of the different actors of the care labour market of Hesse. Besides political and administrative actors like members of the Hessian Ministry of Social Affairs, the federal state chair and the Hessian Agency of the German Federal Labour Office, there are also members of public and private welfare organisations, care institutions, the Hessian infirmary association, nursing schools and colleges represented. As a consequence, this broad range of strategic and operative actors leads to a wide range of interests. As an example: whilst the ministry wants to know, if it has to advance the account of nursing schools alumni, the carriers of old peoples' homes are interested in valid information about the number of available care workers in the region of their institutions. The electronic Information Platform has to consider each of these different information demands. For each stakeholder there has to be an easy access to the specific information he demands.

### 3. Technical Implementation and Functionalities

At the beginning of the project, appropriate information sources had to be identified in collaboration with domain experts. Afterwards, the type of required information had to be specified. Traditionally, this is done via questionnaires and interviews. This usually is related with a lot of time-intensive paper work for all participants. The manual evaluation of the collected data is also a very exhausting job. With the traditional approach, it is not possible to deliver critical information promptly to the specific target groups. Our main goal was to come up with a new one-step solution. Facilitated by modern information and communication technologies, we were able to build up an integrated information portal which incorporates several crucial functionalities for ensuring valid and prompt information supply.

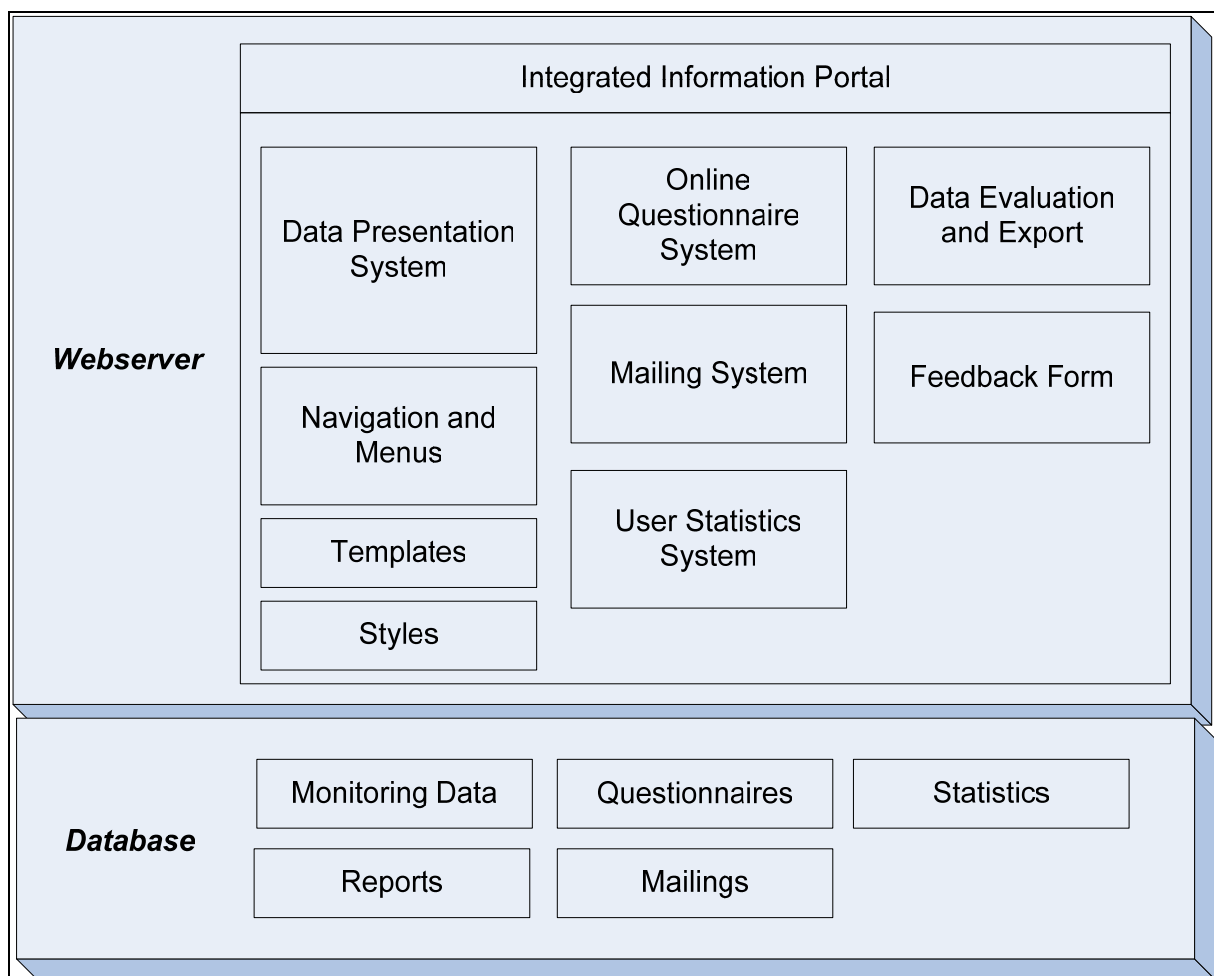
The central aspect of this idea was to replace the old fashioned paper-based questionnaires approach by a new web-based monitoring system. Online questionnaires can be easily created by domain experts. Once questionnaires are available, they can easily be adapted and extended. By using an integrated electronic mailing system, information providers can be notified about their access to interactive online questionnaires. The interactivity of the questionnaires provides to a comfortable environment for information providers. New data submitted by the information providers is stored in a database. Afterwards, the collected data can be evaluated and statistically analysed as well as reports can be generated. Finally, the prepared data can be published in several types within the information portal.

In the following, the key domains of the information portal, 'architecture' 'data collection' and 'presentation', are described in a deepening way.

### Software Architecture of the ‘Hessischer Pflegemonitor’

The foundation of the technical architecture consists of a *Webserver*, a *Database*, and an extensible content management framework. Figure 3 depicts the technical architecture. On top of the *Webserver*, the *Integrated Information Portal* is realised by extending the content management framework with the necessary functionality. For publishing functionality, a *Data Presentation System* is build up and configured. *Navigation and Menu* functionality is created and configured. Layout, formatting and structuring functionality is provided by a *Templates* and *Styles* mechanism. Interactive online questionnaires are implemented within an *Online Questionnaire System* as extension of the content management framework. Also editing capabilities for administration purposes of the questionnaires are realised within that system. *Data Evaluation and Export* functionality is also implemented by a corresponding component. A *Mailing System* is incorporated as well as a *Feedback Form* for quick user-response and a *User Statistics System* for tracking and analysing user activity. The *Database* contains all the monitoring data, questionnaires, user statistics, mailings and reports.

Figure 3: Software Architecture of the “Hessischer Pflegemonitor”





### **Data Collection and Processing via Online Questionnaires**

In order to individually address the different kinds of care institutions listed in chapter 2, domain experts can use the editor to create domain-specific interactive online questionnaires. Questionnaires can include several question types which are represented by different input widgets like radio buttons, checkboxes, number fields, textual inputs, etc. Existing questionnaires can easily be adapted to new requirements, new questions can be included, and the order of questions can be modified. It is even possible to set constraints, for example data range restrictions, or specify dependencies between different questions, in order to get valid data inputs. Information providers are guided through the fill-in process of the interactive questionnaire. Figure 4 shows an example of a questionnaire used to collect information about workforce demand in the health and elderly care system of Hesse.

Figure 4: Example of an Online Questionnaire use by the ‘Hessischer Pflegemonitor’

**1.3.1 Pflegefachkraft mit gerontopsychiatrischer Zusatzqualifikation**

**1.3.1.2 Welche Qualifikationen hatten die Pflegefachkräfte, mit denen Sie diese Arbeitsplätze tatsächlich besetzt haben? Bitte nennen Sie die Anzahl der eingestellten Personen mit den jeweiligen Qualifikationen.**

Altenpfleger/in mit gerontopsychiatrischer Zusatzqualifikation	mit <input style="width: 40px;" type="text"/> Berufserfahrung ohne <input style="width: 40px;" type="text"/> Berufserfahrung
Gesundheits- und Krankenpfleger/in mit gerontopsychiatrischer Zusatzqualifikation	mit <input style="width: 40px;" type="text"/> Berufserfahrung ohne <input style="width: 40px;" type="text"/> Berufserfahrung
Gesundheits- und Kinderkrankenpfleger/in mit gerontopsychiatrischer Zusatzqualifikation	mit <input style="width: 40px;" type="text"/> Berufserfahrung ohne <input style="width: 40px;" type="text"/> Berufserfahrung
Sonstige und zwar: <input style="width: 150px; height: 20px;" type="text"/>	mit <input style="width: 40px;" type="text"/> Berufserfahrung ohne <input style="width: 40px;" type="text"/> Berufserfahrung

Summe: 0

When online questionnaires are filled in and submitted by information providers, the data is stored into a database. Domain experts can immediately access the submitted data and start data evaluation and generation of statistical analysis reports, which can be published in the information portal. Therefore, export functionality to statistical analysis tools is provided.

In order to communicate with information providers and information target groups a Mailing and Communication System is incorporated. Several mailing lists can be managed and contacts can be notified and invited to fill-in interactive online questionnaires or to access the newest information published in the information portal.

### **Presentation via a Web-Based Information Portal**

All provided information services were bundled within an integrated web-based information portal. This portal represents the entry point to the data repository, reports and statistics. By means of an easy-to-understand navigation structure the user is guided to the information of interest. Figure 5 shows a screen shot of the information portal and monitoring system of the ‘Hessischer Pflegemonitor’.

Figure 5: Integrated Information Portal 'Hessischer Pflegemonitor' (Screenshot)

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**Willkommen beim elektronischen Informationssystem  
HESSISCHER PFLEGEMONITOR**

**Ziel**  
Kontinuierliche Bereitstellung von Daten über regionale Pflegearbeitsmärkte in Hessen als Grundlage für eine vorausschauende Entwicklung des Pflegekräftepotentials.

**Daten**

- Beschäftigtenbestand in den ambulanten und stationären Pflegeeinrichtungen sowie in den Einrichtungen der Gesundheitsversorgung
- Pflegearbeitsmarkt in Hessen und in den einzelnen Regionen
- zukünftige Entwicklungen

**Seit dem 28. Januar stehen vertiefende Informationen zur Stellenbesetzungssituation und den Einschätzungen aus der Praxis zur Verfügung.**

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All presented results are structured by the project standards of branch and target group monitoring. For each branch (health care and elderly care) and target group / profession (e.g. health care workers with final degree, registered nurses with and without further education and care assistants) differentiated information is available. As a result of this, each actor group, as mentioned above, is able to accomplish a target-oriented access to the required results. The system is able to publish different types of data in various presentation formats, for example textual reports, data represented in tables, or graphical representations in figure diagrams. It is a part of a project summary report. An example for a tabular representation is shown in figure 6. The table presents staff information about different profession groups of health care workers at hospitals according to different regions of Hessen. Additionally, download of all contents in common file formats (e. g. PDF) is supported. The integrated information portal supports a flexible layout and styling of all contents. Therefore, a strict separation of contents, structuring and styling information is deployed.

Figure 6: Tabular representation of data in the 'Hessischer Pflegemonitor'

Zahl der in Krankenhäusern beschäftigten Pflegekräfte differenziert nach Versorgungsgebieten im Jahr 2005				
Versorgungsgebiete	3-jährig ausgebildete Gesundheits- und Krankenpfleger/innen	3-jährig ausgebildete Gesundheits- und Kinderkrankenpfleger/innen	1-jährig ausgebildete Krankenpflegehelfer/innen	sonstige Pflegepersonen
VG 1 Kassel	4002	340	369	242
VG 2 Fulda - Bad Hersfeld	2185	265	84	148
VG 3 Gießen - Marburg	4645	524	210	203
VG 4 Frankfurt - Offenbach	6735	797	488	511
VG 5 Wiesbaden - Limburg	2612	228	151	161
VG 6 Darmstadt	2659	289	189	257
<b>Hessen</b>	<b>22838</b>	<b>2443</b>	<b>1491</b>	<b>1522</b>

Quelle: Hessisches Statistisches Landesamt

[Diese Tabelle als PDF anzeigen](#)

Diagramm(e) zur Tabelle:

[Versorgungsgebiete KH 2005](#)

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It is very important to quickly receive response and feedback from the information portal's users. Therefore, a quick-feedback form is provided. Furthermore, in order to be able to improve the information and the service offer of the portal it is important to get information about its usage, which is done via user evaluation functionality. Statistics about data accesses downloads and user behaviors are automatically tracked.

#### 4. Initial Results of the User Evaluation

As shown above, the 'Hessischer Pflegemonitor' is a highly differentiated system of data collection, processing, and presentation, that provides a wide range of information for individual stakeholders. But how do they get along with it? To what extent they are interested in differentiated information for their sectors?

To evaluate the users' demands and behaviours, all users of the information platform with data access were polled about the care sector, in which they are working, as for instance old peoples' homes, ambulant services, hospitals or schools. Afterwards, the individual access to different texts, tables and diagrams can be connected with the sector of the user.

The evaluation showed that users from all sectors are highly interested in the results of the 'Hessischer Pflegemonitor'. From October 2007 (when the web-based information platform has been activated) to March 2008, 1.616 users could be counted. Together with that, users of the care providing sectors made the larger amount. They had great demand for specific information about the labour market development in their region. Nevertheless,

also users from other sectors like administration, schools and welfare organisations showed interest.

By taking a more detailed view, it is apparent (except for general results which were accessed by all users) that there is a splitting for particular information according to the individual sectors. Whilst all users showed enormous interest in general information about the care labour market in Hesse, the addressing of sector-oriented information is overrepresented by users from these areas. Figure 7 displays one of five information modules of the 'Hessischer Pflegemonitor' ('care staff') and the differentiated information demand depending on the sectors ambulant nursing service, old peoples' homes, hospitals, rehab clinics and administration during the first month since platform activation. According to the sector, the interests differ between care staff at hospitals and care staff at elderly care institutions.

Figure 7: Access Evaluation at the 'Hessische Pflegemonitor'

Information Modul	All sectors	Ambulant nursing services	Old peoples' homes	Hospitals	Rehab Clinics	Administration
<b>Care Staff</b>						
Staff overview	43	9	23	8	3	0
Care Staff at Hospitals	87	1	55	22	8	1
Care Staff at elderly care institutions	119	26	77	6	9	1
<b>Total – Care staff</b>	<b>249</b>	<b>36</b>	<b>155</b>	<b>36</b>	<b>20</b>	<b>2</b>

All in all, the extensive utilisation of the web-based information portal indicates an enhancement of labour market monitoring acceptance by the stakeholders, especially if the information collected and communicated has been individually addressed according to the demand of the information users.

## 5. Outlook

In this paper, we have demonstrated that an integrated labour market monitoring system with regard to branches and target group monitoring can be decisively improved, if an adequate web-based information system is systematically integrated into the monitoring processes. Moreover, the goal of this paper is therefore to sensitise actors in projects and other interested parties to these aspects, and to encourage further developments of these elements in terms of a systematic communication function. The advantages of the presented web-based Information System predestine the approach on an operational level.

The 'Hessischer Pflegemonitor' represents an IT-supported approach to collection, presentation, and interpretation of regional labour market data within a framework of a detailed conceptual design for monitoring in regional labour markets. The 'Hessischer Pflegemonitor' enables (a) to define information that is individually tailored to the needs of actors, and (b) to organise this information in an Information System, which can be accessed individually by users. In the future, this software system for regional labour markets will integrate through robust data interfaces IT-systems available in various participating institutions. The implemented Framework constitutes the basis for further development, implementation and application of the proposed method.

## **IV. Outlook**

### **Introduction**

The conceptual further development of the Regional Labour Market Monitoring Instrument, in combination with the continuing collection of experiences with its implementation, will occur against the backdrop of a Europe-wide strategy of de-centralizing labour markets. Marco Ricceri takes up this thread and gives valuable insights in these processes. In conclusion, Alfons Schmid sketches out the primary lines that the further development of regional labour market monitoring should take within the European Network of Regional Labour Market Monitoring. He shows that the preparation and usage of prognostic data for small areas need more development. Furthermore, the conceptual elements of Communication and Action need to be more completely specified. Finally, he reports on activities within the European network with the intention of generating a European monitoring concept.

### **The Venice Action Statement – the Decentralisation of the Labour Market According to the OECD - 2008**

*Marco Ricceri*

#### **Premise**

Since long time, OECD, the international organisation of the major industrialised countries, sustains the importance to strengthen the systems of local economic development and, accordingly, to set up efficient, decentralised services, with the aim to improve the productive factors, capital and labour, and to spread entrepreneurial culture on the territories. As regards this general objective, the organisation of the local labour markets and their effective, responsible, decentralised management has assumed more and more an essential, strategic relevance. From here, the work of accompanying and supporting the action of the governments to proceed decidedly in this direction.

To such respect, it is necessary to consider that a true diffusion of the labour market decentralisation processes started in the industrialised world only since the halves of the nineties years, even if some countries had already good experiences and meaningful traditions on this issue. It is just to sustain and strengthen these decentralisation processes that the OECD organised in Venice, in 1998, a first international conference with the participation of the governments, in specific way of the Labour ministers and experts. That conference gave the opportunity for a first evaluation of the initiatives in progress among the major industrialised countries, for a deep examination of the positive and negative aspects; also an explicit engagement was taken by the governments to go further on the undertaken road.

After ten years from the 1998 first conference, the OECD has promoted, always in Venice, a second international conference (April 2008) in which the strategic value of this objective has been confirmed; and this even if the participants – OECD representatives, governments, local authorities and experts - had to recognise that many open problems

still exist, mostly because the increasing pressures of the global economy, and require for an urgent answer.

More, OECD promoted also the unanimous approval of a strategic document elaborated by the responsible of the OECDs LEED Programme (the special Programme for Local Employment and Economic Development). This document constitutes the basic reference for the future commitment of the same OECD and the governments on the issue of local labour market policies and economic development.

It deals with the so called VENICE ACTION STATEMENT a document that contains the "*Principles of Action*" to apply in the management of labour market policy in order to reconcile better the national and local goals, to enhance the flexibility of the entire system, to assure high level of efficiency for appropriate answers to the globalisation challenges. In specific way, it contains some useful indications to find an answer to the following open question: which decentralisation and which coordination for the labour market policy?

### 1. The Previous OECD Conference on 1998

The decentralisation process of the labour market policies has been undertaken during the nineties by the governments with the conviction that it would have made the employment services and the management of the labour market policies more efficient, improving the possibilities of the local economic systems to answer to the global pressures and the occupational needs. In many countries the unemployment rate was very high and the public employment services had to face the complex situations of integration/inclusion of specific social groups as: young people, elderly, women, disabled, migrants. As suggested by the OECD Employment Strategy, a decentralised decisional system would have promoted "*a decisional pragmatic system*". (OECD, 1996).

At the 1998 Venice conference, the governments clarified well their expectations in order to the use of the tool of decentralisation; they also pointed out the positive and negative elements of such policy and the conditions to respect for improving it. In their evaluations, the labour market decentralisation was considered as an important tool but *not sufficient* to achieve the objectives of an higher employment, especially in the short term. In fact, clearly appeared that the decentralisation not necessarily was able to assure a greater level of efficiency of the policies: surely, it was able to provide some increases of efficiency, but also to create situations with a loss of efficiency.

For instance, regarding to the *negative effects*, the governments considered that the decentralisation introduced the risks of:

- to delay the times of the decision making because the complexity of the consultations system;
- to produce a duplication of the activities in the state territory;
- to broaden exceedingly the range of objectives to pursue.

All this would have been able to slow down and to weaken the accomplishment of the national occupational programmes as regards the initial forecasts of the central governments.

Instead, looking at the *positive aspects*, governments considered that the decentralisation would have been able to increase notably the effectiveness of the labour market policies in the long term, by promoting the business development and social cohesion. In the globalised, knowledge-based economies, one of the governments priority objectives was –

and still is - the sustainable development of the local communities. With regard to that, decentralisation could have been a precious tool for:

- promoting a greater adaptability and flexibility of the labour market and giving, in this way, a valid contribution to overcome the lacks of the macroeconomic policies and to face better the negative by-products of the changes such as the precarity of employment;
- integrating among them the development policies of a specific area by the organisation of local partnerships;
- improving the information system, essential for the accomplishment of the programmes, particularly those finalised to connect the demands of the enterprises with the competences of the manpower, given the greater proximity to the social groups and the local actors of reference (business, trade unions, social organisations).

## **2. 1998-2008: Ten Years of OECD Monitoring on the Decentralisation of the Labour Market**

In these ten years, the monitoring and evaluation activity developed by the OECD Leed Programme on the concrete policies realised by the governments, has underlined that the issues tied up to the functioning of the labour market have put more and more to the center of the economic development strategies elaborated by the regional and local authorities. Particularly, a decisive role for the success or less of such strategies has been played by the actions for the human resources qualification which involve the actors of the development in the improvement of their professional skills, the diffusion of the innovations in products and productive processes, the spread of entrepreneurial culture, the strengthening of the social cohesion.

In practice, the experiences of the last period allow to record a notable amplification of the two traditional goals of the labour market: to guarantee a sufficient degree of efficiency in the employment of the workforce and to improve its productivity. In the years, the labour market, education and training policies have shown to be key-factors for the economic development of a territorial system submitted to the strong pressures of change. These new functions of the labour market bring an essential, additional contribution to the national policies for the promotion of the labour productivity and economic growth.

In general, the OECD analyses have confirmed that the *decentralisation* and every other institutional reform finalised to enhance the bottom up initiatives can produce very positive and important effects only under the condition to be accompanied by effective measures which guarantee the *coordination* of such initiatives. This because by now the labour market policy, training policy and economic policy are tightly interconnected and all essential for the goals of the growth.

It is just facing this double need - of an effective decentralisation and also of an effective coordination - that OECD is forced to report the existence of a large number of obstacles and deficiencies in the governance systems that still today prevent the labour market decentralisation to express fully all its positive potentialities. For instance:

- the rigidity in the training systems (slowness in the change of programmes and curricula);
- the fragmentation of the competences among the actors of the economic development and the lack of real interconnections;

- the separation, often very rigid, between the competences in the issues of economic; development and those related to the human resources development ;
- the incapability in planning strategies for the long period, above all to local level.

### 3. The Institutional Reforms of the Governments

To overcome these obstacles and to fill these deficiencies, many governments have undertaken in these years some important institutional reforms that can be gathered in two principal categories: those that aimed at a strong decentralisation and those that aimed at the organisation of the partnerships.

#### 3.1 The Labour Market Decentralisation

In the first case, of the decentralisation, the governments have followed two principal ways: the *devolution* of powers to the local labour markets and the *administrative decentralisation* of the Public Employment Services – PES.

With the devolution reform the national government, from a side, has maintained the entire responsibility for the definition of the general framework of the development policies, for the elaboration of the orientations and the guide-lines of such policies, for the funds management; but, from the other, government has submitted the responsibility to enrich such policies of concrete contents to the regional governments and, above all, to realise them. Examples of this type of reform are offered by the experiences of countries as Belgium, Italy, Spain, Canada, Mexico. In some cases, the degree of devolution has been the result of a negotiation, case by case, among national government and regional governments that concerned the administrative capability of the regional governments and their real will to assume precise responsibilities on these issues. In other cases, as the United States, the passage of competences and responsibilities was almost automatic.

With the reform of the administrative decentralisation, the second form of decentralisation, the State simply provided for a different organisation of the Public Employment Services - PES which remained an unitary national service, even if more articulated and present in the local realities. In practice, with this type of reform the whole chain of the regional and local offices keeps on answering to an only political and managerial body at state level. The state has simply submitted a greater degree of autonomy to these offices allowing them to enrich the policies and the national programmes and also to elaborate some new programmes, even if with character of integration.

The progress done in these years with these two types of reform are notable but OECD ascertains that the degree of flexibility reached is still *insufficient* to assure the organisation of a fully decentralised system able to produce most greater positive effects. Particularly OECD underlines the importance to find a solution to the problem, still entirely open, of whom has to have the responsibility to establish the targets of the labour policies and the conditions for their better accomplishment. Must these targets be established by the national state? Do they have to be the result of negotiations with the regional and local offices? Do they have to be established in cooperation between the public offices and the private, social partners and the other main actors of the local economic development? In what measure the public services of the labour market, in coherence with the requests of the free market, must be participated by the private actors?



### 3.2 The Partnerships

In the last years, states have also intensified the experimentation of various forms of partnerships between public and private actors and this with the aim to harmonise better the national goals of the policies with the local demands. Already at the end of the seventies and during the eighties, the organisation of partnerships had been recognised by the states as a promising way to allow the local communities to find the most proper solutions of their specific problems of economic and social development. Since then, in all these years, many are the positive experiences done in a large number of industrialized countries with the aim to organise effective partnerships among local authorities, private business, the civil society associations.

This positive experimentation brought the process just to the point that this of the partnerships has been assumed by now, in many cases, as a real priority objective of national policies. For instance, this happened in Canada in 1986 with the *Community Future Development Programme* finalised to help the local communities achieve lasting economic independence through partnerships activities. In Europe, the first pilot-experiment with partnerships took place in Ireland in 1991, and largely extended in the following period, during the nineties, because its positive effects. The same European Union has planned the use of the *European Structural Funds* really on the practice of partnerships and from 1997 to 1999 provided for the introduction of this principle in the employment policies, sustaining the "*territorial employment pacts*", which are still in operation in a large number of EU countries.

Generally, partnerships pursue three joined objectives: employment, social cohesion, skills development. In some instances they also work to identify endogenous development opportunities and contribute to the diffusion of the entrepreneurial culture. The studies conducted on this issue by the OECD (*Study on Local Partnership*, 2001 and 2004) have demonstrated that their principal impact is "*to stimulate the uptake of public programmes that can help local actors to move forward on their own local agendas, assisting in furthering local development, and connecting local initiatives with government programmes. Their close relationship with the local community can also allow partnerships to identify new productive activities that bring difficult target groups back into the labour market*".

Insufficient, according to the OECD, are the results gotten in order to the better functioning of the labour market policies, particularly with regard to the harmonisation of their national goals with the local demands. Since such goals and targets are often not negotiable with the local authorities, the positive effects of the partnerships on the local labour market ends up being strongly reduced just to the point to become "*marginal*." More; partnerships don't succeed in practicing a sufficient influence on the necessary coordination between the labour market policies and the other development policies also because governments very rarely succeed in involving more than one administration in the planning processes of their interventions and, consequently, apply different and parallel programmed strategies in the regions and territories. In any case, it is clear that the success or less of the partnerships depends on the capability of the political decisions makers to keep the opportunities offered by the eventual decentralisation reforms, to adapt policies and services to the local demands. According to the OECD, "*in many cases, and despite many years of experimentation in the field of local partnerships and networking policy, integration at the local level is still failing to materialise.*"

With regard to some positive experiences, we can refer for instance to the *Workforce Investments Boards*, in the United States, and to the *Sub-regionals Employment Committees*, in the Flanders. It deals with situations in which partnerships have assumed the form of a tripartite management of local labour market, with the involvement of the business, labour unions, representatives of the regional and local public services. Also in these cases, however, the impact of the partnerships on the economic development has been weak despite the share of the enterprises world. In the United States, the initiatives for the economic development in many places have been organised in parallel way to those for implementation of the work force skills. United Kingdom and the United States experimented the "*Regional Skills Alliances*", as a way to overcome the existing gap between the necessities of the economic development and the labour market policy and to connect better the demands of the enterprises to local needs. The main result of such voluntary alliances has been to put the enterprises in the conditions to clarify their needs in terms of skills; but also to point out the difficulties of the existing labour market structures to give appropriate answers to this demand of the enterprises.

The governance of employment and skills is undoubtedly a complex problem. Till now, as the OECD, "*neither decentralisation nor partnerships appear to provide sufficient answers to the harmonisation of national and local objectives. Overall, the problems of human resource development have not been satisfactorily addressed through the transfer of powers to regions; and co-ordination of policies cannot be forced at local level. The main reason for this seems to be that the strict performance requirements associated with the management of public programmes at local level by and large reflect national policy goals. Therefore, a key challenge for the future will be the provision of greater flexibility in the management of policies so that they can be better adapted to local circumstances and co-ordinated with other initiatives if needed, while maintaining full accountability and maximum efficiency in service delivery. Secondly, stronger strategic capacity is required at local level to link up programmes, initiatives and local stakeholders*".

#### **4. To Integrate Decentralisation with Effective Initiatives of Coordination**

The importance of combining flexibility in national programmes with the development of local strategic capacity can be well illustrated by analysing some specific labour market issues and the ways in which they are managed at local level. Two of such issues, for instance, concern the *upgrading of the skills of low-qualified workers*, a specific objective under the broader goal of workforce development, and the *integration of the migrants in the labour market*, which comes under the wider goal of integrating the disadvantaged people into work.

These two issues have been above all the subject of particular attention by the local authorities in recent years. Both have a central relevance for the policies of the national governments, but the governments have in the most part lacked appropriate national policies for addressing them. In the absence of a national approach, local initiatives have been set up to fill the gaps, perhaps because at this level the urgency and the importance of such issues is better felt. The fact is that also at local level, despite many accomplished efforts, a lot of lacks are recorded because the fragmentation of the initiatives and the lack of a strategic vision of the development; and the partnerships experiences till now have been not able to fill these gaps. Therefore, also these two cases confirm the necessity to face urgently the double problem: a) the flexibility of the national programmes, for a real decentralisation, and b) the coordination of the initiatives at local level.

In this last case of the coordination, the local action can give an important added value to the national policies, but only if well managed. For instance, concerning the two overmentioned specific issues (the skills of the low-qualified workers and the migrants integration), the local action should produce changes:

- in the intelligence (building a shared diagnosis of the labour supply/demand structure as a basis of a coordinated approach) and
- in the intermediation (developing brokerage between workers and employers, employment services and vocational training organisations to better link demand with the supply of labour).

To build such situation, of clear utility for everybody, it is necessary - this the point to underline ones more - that national policies should be sufficiently flexible and able to give the local actors the necessary instruments and tools (including the financial funds) for good performances. More, this flexibility should not limit itself to the labour market policies, but should spread its influence to the whole educational and training system, as to social policies, all essential factors for the employment, integration, economic development of an area.

In general, for organising a good system of guarantees between national governments and local actors, to make sure that the decentralised competences are well managed at local level, it is important to find a solution to the following problems:

The first one concerns the *method of consultation* with which national governments should aim to link the general development strategies, also sectorial, and the local development. In this case, while establishing the targets for labour and training policies, both the subjects, national and local, should proceed with a permanent consultation, which recognises the mutual responsibilities, duties, capabilities.

The second problem concerns the *evaluation and interpretation of the economic processes*, which are propaedeutic to the elaboration of a strategic planning for the medium and long-term, the only way to give a more valid meaning to the same short-term interventions. An appropriate answer to the needs of the enterprises requires certain a clear understanding of the real conditions of growth to local and global level and, accordingly, the forecast of their requests in order to the increases of productivity, to the availability of skilled workforce; in short a knowledge system appropriate to understand the nature and implications of the innovative processes. Such strategic planning cannot start without valid cognitive basis, therefore an exhaustive data collection and a permanent monitoring are required, as a systemic evaluation of the economic, social and cultural processes. According to the OECD, "*thus for governments, capacity building and supporting the provision of disaggregated dates should be also central elements in their strategy to ensure the success of decentralised reforms*".

From here, the relevance of the *Principles of Action* enacted in the Venice Statement 2008, principles which have been approved by the governments and which will be their references for the next future.

## 5. Venice Statement: For a New Role of the Labour Market Policies

The Statement affirms the strategic value of the flexibility in the management of the labour market policy as the principal way to contribute to the increase of employment and economic growth. To reach this goal, governments should elaborate a new role for the labour market policy, founded upon the following elements:

- All the subjects which play an active role in the development of human resources, essential in a globalised knowledge-based economy, the actors which are defined as the policy makers of the employment and training policies, should participate actively to the initiatives not only those aimed to improve the skills of the workers, but also to those linked with the most general policies aimed to enhance and spread innovation, entrepreneurship, social cohesion. This is worth, particularly, to local level where it should be important to develop local integrated strategies, with a more active role, in terms of leadership, of the Local Development Agencies (employment, training, investments, etc.);
- The local policy makers should commit themselves for the best use of the competences and responsibilities as well the degree of autonomy they received by the national governments, according to the principles of flexibility and decentralisation, showing a true ability to take this opportunity; this, not only by organising effective coordinations among them, but adapting and making more effective their own services as well introducing those innovations, also organisational, which are necessary to apply the national policies to the local demands.
- With the aim to realise an effective decentralisation in the governance of the labour market policies, the national governments have to define a clear and coherent system of norms and rules on the decisional and operational accountability of the many political actors which operate on the issue, to promote both local partnerships and an effective coordination of the national and local interventions. With regard to that, OECD underlines particularly the importance to respect both the targets which have been negotiated with the local actors and the guarantees of efficiency in their new duties: *"Managing the decentralisation is a delicate exercise. Since value for money and efficiency in service delivery are important government goals, performance management criteria for labour market policy remain stringent even in a decentralised framework. Flexibility is provided to local policy managers but only to the extent that they fulfil predetermined targets on an annual basis. Accountability requirements are set tightly in order to ensure transparency in the use of public money"*.
- Finally, the local actors should be able to show a real capability and competence to connect the interventions on the labour market with those on economic development, giving valid cognitive analyses on the development problems and elaborating strategies not only for short-term interventions, but also for the long-term.

## **6. Venice Statement: The Principles of Action**

With these references to the principal conditions to be respected for defining a new role of the labour market policies, OECD together with the governments which approved the Venice Statement 2008, also define the Principles of Action on which a joined commitment will have to develop by national, regional and local authorities in the labour sector:

### *Inject Flexibility into the Management of Labour Market Policy*

It should be possible for the local level to give strategic orientations to the implementation of programmes. Local staff should have the ability to make decisions on the orientation of public programmes and services, in addition to achieving predetermined objectives.

### *Establish an Overarching Management Framework which Embeds Local Flexibility*

Employment policy should be managed in a way which supports greater local differentiation while still paying attention to aggregate impacts at the national level. In particular, targets should be negotiated with the local level in order to ensure that they meet local strategic needs, while being embedded in a wider framework which ensures that aggregate national policy goals continue to be met.

### *Build Strategic Capacity*

Enhancing local capacities becomes particularly important in this context, as strategies for human resources development must be integrated and matched to the economic reality on the ground. Staff within labour market agencies should have a strong knowledge of local business practices, local economic conditions, industry developments, and appropriate methods to identify skills gaps and deficiencies in local economic sectors. They should also develop the analytical skills necessary to use this knowledge as the basis for developing broad strategic orientations locally.

### *Build Up Local Data and Intelligence*

Building an understanding of economic and labour market conditions demands, as a prerequisite, refined data collection and analysis as well as expertise in a wide variety of fields. The capacity to gather data locally and organise it in a way which can support strategic planning exercises is critical. The national level can support this process by ensuring that data is disaggregated to the local level and by making available analytical tools which can be adapted to local circumstances.

### *Improve Governance Mechanisms*

Labour market agencies should collaborate effectively with business, trade unions, civil society, education institution, research centres, economic development agencies and local authorities. There is no governance mechanism which fits all institutional frameworks, but partnership have a certain value in bringing different stakeholders together to develop appropriate and realistic strategies.

### *Improve Administrative Processes*

Aligning policies through institutional reform such as decentralisation is a difficult challenge. In large countries, with complex distributions of power, a perfect match may always seem just beyond reach. A wide-scale review of how administrations function, cooperate and manage policies is required to support better collaboration between different administrative layers and between different policy institutions. This is particularly important given that the new, broader goals for human resources development cut across a number of different policy areas.

With reference to these Principles of Action, the LEED Programme Directing Committee of the OECD will commit himself particularly to help governments make the administrative changes and governance reforms necessary to meet this challenging policy agenda, to improve the labour market functionality, to define a clear framework of the responsibilities assigned to local level (Employment agencies, local authorities, decision makers for economic development), to strengthen the collaboration between labour market institutions and enterprises for the best use of the skills and professional competences of the workforce, to favour strategic alliances to enhance the intersectoral collaboration at sub-regional local level, to implement the *informative systems and those of monitoring*, to strengthen the ability of the labour market institutions to promote an “open” managerial approach, overcoming the limits of a bureaucratic tradition which often doesn't support the joined work.

If, from one side, nobody doubts of the necessity to organise an effective decentralised system of labour market, for giving appropriate answers to the demands of great mobility and qualification of the productive factors set up by the global economic processes, from the other, the OECD Principles and Recommendations point out well the great obstacles that still limit this experience. It is entirely evident, for instance, that the improvement of the flexibility of the local labour markets, the so-called “*travel to work areas*” it is still today a great open problem for the many obstacles that in practice limit the full labour mobility.

Remy Prudhome wrote on 1995: “*These choices are not so much whether to decentralise in general, but rather what functions to decentralise, in which sectors, and in which regions. In many cases the problem is not so much whether a certain service should be provided by a central, regional, or local government, but rather how to organise the joint production of the service by the various levels*”.

## **7. The Decisive Factors for the Decentralisation**

For its effectiveness, it is important that the choices for the decentralisation keep some precise criteria. According to OECD, a review of the studies till now published puts in evidence the existence of many different factors which push to enhance the efforts for proceeding in this direction. Among these factors, OECD LEED Programme highlights the following for their particular relevance:

*Local diversity*: Local labour markets vary significantly with respect to industrial composition, skills and employment, meaning that a one-size-fits-all approach is not always appropriate. Some local economies can be left behind within a growing national economy because of the pull of successful areas both for employers and higher skilled workers, while others experience the challenge of integrating new migrant populations. Local diversity calls for different strategic priorities locally, not only differences in day to day delivery.

*Adaptability:* The skills and employability of the local labour force are crucial to the ability of economies to adapt to global change. The quicker that the unemployed can be re-trained for new jobs, the more adaptable a local economy will be. However, it is not just about responding to job losses – companies and workforces also have to adjust to new production processes and new ideas in the knowledge economy, while workers have to constantly update their skills to contribute fully to productivity. Governments therefore need to establish legislative and institutional frameworks that permit local economies to adjust quickly.

*Complexity:* Achieving the above goal is not easy given the complex inter-relationship of different policy objectives embedded in skills, employability and economic development systems. Institutional reform to achieve different policy objectives often leads to a complex multi-layering of organisations, partnerships and initiatives and a confusion regarding roles and responsibilities at the local level. Proper decentralisation implies a clear sharing of responsibilities for decision-making at the local level among a number of actors, and agreement on an accountability framework politically acceptable to all governments levels. In fact, decentralisation appears to be a necessary condition for joining up services at the point of delivery. This is important not only for strategies of economic growth, but also for tackling high rates of economic inactivity, where people with multiple labour market disadvantages require holistic and tailor made approaches.

According to OECD, another element to clarify concerns the meaning of the term "*local*", with reference to the areas of the labour market. By "*local*" OECD means "*a level of local labour markets, where economic development strategies are designed and where policy areas need to be linked up. This does not necessarily correspond to the municipal level, where the Public Employment Service – PES has its antennas. These are often merely delivery agencies with low critical mass and strategic capacity, except in urban centres where one office is often given more significant administrative responsibilities and a co-ordinating role. In less urban areas, these responsibilities are more frequently found at a sub-regional level*".

For an appropriate definition of the "*local*" dimension we must refer more properly to three different types of sub-regional levels, to which three different levels of government or administration are linked:

- administrative regions with a population of between 800,000 and 3 million inhabitants (NUTS 2, following the nomenclature used by the European Union and extended by the OECD under the name of "territorial level 2");
- sub-regions with a population of between 150,000 and 800,000 inhabitants (NUTS 3 or "territorial level 3");
- localities under the 150,000 inhabitants (NUTS 4 or "territorial level 4", and below).

With reference to these three levels, the OECD specifies: "*As territorial level corresponds to areas of less than 800,000 inhabitants, it fits reasonably well the description of to local labour market.*"

## 8. Decentralisation: the Great Open Challenges of the National Governments

An analysis of the issue – how the programmes are managed in the twenty-five countries of the OECD – conducted for the Venice conference 2008, points out that the local actors seem to have a relatively limited autonomy, even after the decentralisation reform, particularly in order to the choice of the public actions to conduct on the labour market and to the definition of the targets of the performances. The sub-regional offices are, currently, more autonomous in to organise the offer of the public services, in to decide their collaboration with the other local actors and in to define the strategic proposals for employment. Nevertheless, in order to such strategies, their commitment still today risks to be compromised because the large number of limits they meet and also because their incapability to adapt programmes and services.

To overcome these obstacles it is necessary to deepen the analyses on a set of situations concerning, for instance: the degree of participation the local offices have to the definition of the national programmes; the degree of autonomy of the local actors in the realisation of such programmes; the entity and freedom in managing the financial resources at their disposal, the degree of autonomy in the staff organisation, in contracts with outside services.

But above all it is important that governments of the industrialised countries decidedly face some important open challenges still opened. They concern:

### 8.1 The Challenge of the "Accountability"

The first challenge concerns the tightly respect of the "*accountability*" criteria. Thus a challenge for labour ministries and vocational training institutions is to provide more flexibility in the management of policy while ensuring that standards in efficiency and accountability are met. According the OECD, "*it also remains to be understood whether additional flexibility in the management of policies can assist in making the labour market itself more flexible, through for example the development of "flexicurity" systems that support dynamism and movement in the labour market while helping reduce time spent in unemployment through powerful active labour market programmes*"

Other important problems to be solved concern, for instance: the risk of inequality in the quality of services delivered in a territory in comparison with another; the fragmentation of the competences above all when more levels of government are involved; the lack of comparable data and information; the multiplication of the costs (for the financial and administrative documentation, for the monitoring and evaluation programmes); the risk of free-competition distorsion in the case of financial support given to the local enterprises against enterprises of other territories; the risk that the attribution to the sub-national authorities of the competences concerning the legal and financial supervision and control allows to an unequal application of national laws and rules.

On this issue the authors William D. Eggers and Stephen Goldsmith wrote: "*The problem of the accountability is one of the most difficult challenges of networked government. Without authority and responsibility parcelled out throughout the network, whom do you blame when something goes wrong? How do you achieve results when you have limited control?*"

With regard to the accountability, it is important to remember that this issue is generally studied through four dimensions - legal, fiscal, performance, political – and that accountability is the tool used by the central governments to make sustainable a



decentralised political systems. In any case the accountability reflects the two types of overmentioned decentralisation, administrative and political. In the traditional administrative systems, accountability insists on the juridical and financial responsibility of the managers of the local services, on the separation between public administration and politics, on the parameters of flexibility which are at the basis of the new orientations dealing with the organisation and functioning of the Public Administration (the paradigms of the *New Public Management NPM*). In the second case, accountability makes reference to the division of the power between national and sub-national authorities and to the content of the political competences and responsibilities given to the sub-national levels of government (see, for instance, the regional reforms approved in Belgium, Italy, Spain).

To face the accountability issue also means to solve the specific problem of the guarantees concerning the real capability to act of the local actors. This is the true central knot to loosen. There is no doubt that how much more the decentralisation process proceeds, so much more it must be supported by a true assistance to the local actors and leaders, to put them really in the conditions to face the complex development problems. In this sense, according to the OECD expert, Hugh Mosely, *"decentralisation needs to go hand by hand with capacity building."*

## 8.2 The Challenge of the Coordination

A second challenge is that of the coordination between labour market policy and economic development and innovation. According OECD *"to have any effect, decentralisation needs to be combined with an equal willingness to coordinate policy actions. Labour market policy, vocational training and economic development are often compartmentalised, managed in "silos" and guided by narrow objectives which take into account poorly the broader policy context. In particular, to help localities prosper in a global, knowledge-based economy, labour market policy needs to have a strong demand dimension in which labour market information and training are geared to the needs of local business and local innovation systems, while balancing the need for quality employment and decent jobs"*. All this may require close working between labour market policy makers with economic development agents. With regard to that, OECD underlines: *"New methods of working may need to be developed and barriers of organisational culture and language may need to overcome"*.

A testing ground for the effectiveness of the coordinations policies is provided by the implementation of comprehensive skills strategies, for the low qualified workers as for the most disadvantaged categories, which have objective difficulties to maintain their place or to enter in the labour world. In a knowledge-based economy, skills matter to local economies in many different ways, impacting on issues as diverse as foreign direct investment, innovation, social cohesion. Often, OECD remarks, skills-related decisions are made by a great number of stakeholders, *"based on partial information, and with direct implications for a number of different policy areas, including those of immigration, training and integration"*. In any case, in the major industrialized countries, it comes out that *"84 per cent of people who have achieved a tertiary education qualification are in employment. By contrast, only 56 per cent of people without even an upper secondary qualification have a job"*. In a contest where one of the priorities of government is to increase the flexibility of the labour market, it is essential to translate local labour demand into possibilities for upgrading the skills of the workers and disadvantaged groups. *"There are obvious benefits from taking an integrated approach to such issue"*.

In general, this is the final remark of the OECD, the experience of these years has shown that the goal of an high degree of coordination, horizontal and vertical, can be reached only with a "*cultural change*" that invests the way of working and the relational system among the management, the staff, the policies makers. Also an effective, mutual trust between the public and private partners, is an essential element for the elaboration of a common vision and a planning finalised to the growth.

## **9. The Decentralisation of the Labour Market: Some Remarkable Examples of Reform**

### *Australia*

2004 – Foundation of the Centrelink.

Centrelink is an agency of the Department of Human Services, which was newly created in a broader reorganisation that brought six service delivery agencies under the department. The stated outcome of Centrelink is to provide access to government services that effectively support self-sufficiency through participation in employment, education, training and the community. Its strategic priorities include delivering services and payments to those workers and families in need, developing the capabilities of Australia's people, and fostering opportunities to collaborate with other agencies. At the national level, Centrelink is governed by a small executive committee which reports to Centrelink's chief executive officer. Services are provided through 328 customer service centres and 25 call centres.

### *Denmark*

2007 - Structural reform of the Labour Market. Previous reforms during the nineties.

In Denmark, labour market policy is an independent economic policy area with a particular focus on employment and the development of the workforce. It is increasingly being coordinated with local economic development policies at the central and regional levels. The reform has produced deep changes not only in the institutional set-up but in the structure and division of responsibilities between the state, municipalities and social partners, along with more decentralised planning of the employment effort. The reform also introduced a greater degree of central performance and target management that focuses on the effects and outcomes of the efforts made to help unemployment back into employment, rather than on the activities undertaken.

The structural reform reduced the previous 271 municipalities to 98, and the 14 counties were abolished and replaced by 5 new administrative regions governed by popularly elected bodies. Responsibilities and the division of labour were restructured, resulting in more tasks and obligations for the municipalities, which are now responsible for almost all public services. The municipalities are governed by directly elected politicians.

The Public Employment Service (PES) and the Employment Authorities in the municipalities have come together in 91 new Job Centres. The legislation prescribes that the state and the municipality authorities based in the Job Centres must cooperate in a joint employment effort. In 14 municipalities the Job Centres are referred to as "*pilot Job Centres*". With the reform the Job Centres have become the key to Denmark's employment efforts.

The management system has three different policy and administration levels. At the national level the Minister for Employment sets a few measurable target and focus areas. These are the starting point for negotiations involving the National Labour Market

Authority, the Employment Regions and the Regional Employment Councils on the content and extent of the regional objectives. These objectives are specified in a contract between the Minister for Employment, the Employment Regions and the Regional Employment Councils. The contract includes targets and specific objectives for each employment region in the coming year. At the local level, employment plans are drawn up and submitted to the local employment councils. These plans take into account both the targets set by the Minister and the regional objectives. The plans are characterised by a precise definition of the objectives, priority, budgets, actions and times of its accomplishment. In summary: a) *national level*: Minister for Employment, The National Employment Council, National Labour Market Authority; b) *regional level*: Employment Regions, Regional Employment Councils; c) *local level*: 77 Job Centres, 14 Pilot Job Centres, 91 Local Employment Councils. The reform and this model are based on the assumption that public interventions are necessary to ensure adaptability among both employers and employees, which is crucial for the effective functioning of the labour market.

The tripartite co-operation between state and social partners (trade unions and employers' organisations) is an integral part of the labour market model. The model is based more on agreements rather than regulation. As long as the social partners are able to solve the problems that exist in a responsible manner, the state will not interfere.

The Danish occupational system is defined by the so called "*flexicurity*" system, which can be depicted as a triangle. The first side of the triangle consists of flexible rules governing the hiring and dismissal of employees. These make it easy for employers to dismiss employees during periods of recession and to hire new ones when the economy picks up again, enabling them to adapt to the changing demands and conditions of production and economic activity. The second side of the triangle consists of security for wage earners in the form of a comprehensive social safety net in the case of unemployment, and the active labour market policy makes up the third side of the flexicurity triangle.

### *Fed. Russia*

2007 – Decentralisation: reform for a new model of governmental management of employment services.

Since 2007, the federal government has delegated a certain number of powers and competences to the regional governments concerning, for instance, the supervision over and inspection for employment law compliance. The funding necessary for the exercise of these powers was provided for by the federal budget in form of subventions to regional budgets. Apart from the funds transferred from the federal budget, regional government bodies can use their own funds to finance make-work activities. The main directions of the Russian public policy in the field of labour market regulation are the following: modernising labour and employment legislation; organising the labour market monitoring system; ensuring the balance between vocational training and demand for workforce; facilitating the increase of workforce geographic mobility; optimising the influx of labour migrants; stimulating the population's economic activity; improving the quality of jobs. The expected benefits by the introduction of the new decentralised model specifically are: more flexible facilities and government employment services; co-ordination between regional employment promotion programmes and priority national projects, regional social and economic development programmes, investments projects, etc; an eventual enhancement of social security protection and a larger range of government employment services funded by regional budgets.

The federal government will exercise regulation, strategic planning and supervision over the execution of delegated powers by regional executive boards.

### *Finland*

2007 - Institutional reform of the government departments, national agencies, starting with a new decentralised system for economic and labour development.

A new Ministry of Employment and Economy started at the beginning 2008, combining the former Ministry of Labour and the Ministry of Trade and Industry and the Regional Development section of the Ministry of Interiors. The goal of the new ministry is to respond with foresight to changes in global economy and to create the conditions on levels of government, for taking action that will be successful in the network economy. The new ministry creates the opportunity to invest in companies' innovation and productivity, in developing and ensuring the availability of labour force and in utilising synergy to make changes in climate and energy policy.

A key objective is to coordinate the interventions on the central level so that they directly serve the regional and local levels. The objective is for the central, regional and local levels to function as a network, both in horizontal and in the vertical direction. From the point of view of local development, the aim is to achieve a situation in which the employment offices, the regional enterprise services and development companies together with the providers of training function as one and the same office for the benefit of their regions' enterprises and people.

The reform of the central government is not alone sufficient; for this reason, the Finnish government has set-up a project aimed at reforming regional government in the whole country, which will be completed by the year 2010. This reform will bring to a deep change of the actual system that since 1994 is based on the Regional Employment and Economic Development Centres, the so called *T&E Centres*, a regional articulation of the national government's bodies, and the *Regional Councils*, composed by the representatives of the municipalities. The current proposal is that the numerous state regional administration authorities operating on the regional level be brought together in two units: a) the "*Center for trade and industry, transports and natural resources*" with the assignment to face all the problems that directly or indirectly concern the regional development; b) the "*Regional government agency*" with the assignment to improve the legislation and to check its effectiveness. The responsibilities and competences of the Regional Councils, which are formed by the municipalities, will be strengthened. The new structure tries to reflect, also in the work methodology, the principal characteristic of the modern societies, that is a network society, and also to promote "*market democracy*".

### *France*

2007 - Structural reforms of the Labour Market; 2008 - Reform of the Employment office.

The preceding reforms go up to the eighties and aimed to strengthen progressively the territorial dimension of the state interventions. In this process, competences have been assigned to the following institutions: a) Regions, competences on economic development (1983), professional basic training (1983), vocational training (2003); b) Departments, competences on employment and welfare (RMI 1988-2003); c) City administrations and Intercities associations, competences on employment and economic development. A true system of regional employment services was set-up in the Regions and Departments only since the years 1993-1995.

The 2007 reform aims to integrate the entire territorial dimension inside the national labour policies and tries to create a true space of autonomy for the local initiatives. On 2008, the reform of the employment services has created an unique network of employment and assistance services, starting by the *National Agency for Employment* and the *Equal Network for Assistance* - UNEDIC. The network has at disposal 5 million Euro of budget,

refers to only one managerial body and to 40.000 agents; operating at regional level. It has also competence for programmes planning. For the vocational training it is foreseen the possibility to promote joined interventions and financing by all the principal public and private local actors. In 30 departments, an experimentation has been promoted with the aim to favour the return to job by the beneficiaries of the guaranteed minimum income (RMI) and this with policies of inclusion founded on the co-financing among state and departments.

### *Italy*

1997 - 2007 Ten years of laws of reform of the labour market have brought to a full decentralisation to regional level, while a lot of lacks are still recorded with reference to local decentralisation. The process is still in progress. The most greater innovations have been introduced by the followings laws: Bassanini Law n.59/1997; Treu Law n. 196 / 1997; Legislative Decree n. 469/1997; Legislative Decree n. 112 / 1998; Legislative Decree n. 181/2000; Presidential Decree n.442/2000; Legislative Decree n.297/2002; Biagi Law n.30/2003; Moratti Law n.53/2003; Legislative Decree n.276/2003; Legislative Decree n.247/2007. Another fundamental change of the institutional framework has been the constitutional reform (art. 5 of the Constitution, with law n.3/2001) which devolved a legislative power to the Regions. An exclusive power, on the issues of planning education and professional training; a concurrent power, state-regions, on the issues of education and employment. In the latter case, Regions exercise legislative authority in the field of fundamental principles expressly determined by the central state. Under of the Regions act the Provinces which are delegated to effect the regional policies, to organise the local services, besides developing other functions expressly assigned. The governance of this new system is inspired by the principles of horizontal and vertical subsidiarity and the cooperation among public administrations, the competent private structures and social partners. The principal tool of action, the so called "*negotiated planning*" till now has reached the objective to promote cooperation among the main actors, but missed the objective of the integration among employment policies, training and economic development. Other critical elements concern the disparity of the performances among the regions, particularly among those of the North and South of Italy, and the centralistic attitude assumed by the Regions in managing the powers and competences devolved by the state.

### *Spain – Catalonia*

2008 - The system of the competences and responsibilities is articulated in the following way: a) Ministry for Labour and Immigration (Spain): legislative competence, labour market policy coordination, unemployment subsidies competences, enabling employment policies throughout the Spanish territory; b) Autonomous Regions (Catalonia): planning of active labour market policies, supply and demand matching, fostering and execution of active labour market policies, promotion of local development initiatives; c) Local Entities: execution of several employment programmes, launching economic development initiatives through their specific areas. In the regional experience of Catalogna, two important integrated projects have been set-up in the sector of training and employability: FP.CAT.PLAN (Initial, Occupational and On-going) and FORMAT T (Innovative On-going Training); at local level, the following innovative experiences have been set-up specifically in the issue of labour market policies: BARCELONA ACTIVA (entrepreneurship, new jobs and skills); SABADELL (textile restructuring, new sector and school failure), MATARO' (knowledge-based society, training and urban development), REUS (social inclusion, new

skills and cultural development). Besides, the project TERBALL ALS BARRIS (cities and regions plan and decides training initiatives) has been promoted to enhance the organisation of local partnerships. To the aim of a good local economic development, Catalogna plays particular attention to the information and evaluation system. For instance, in the county of Barcellona, 25 local market Observatories are active. There is also the project to set-up a new *Labour Observatory* and a *Public Policies Evaluation Agency*, for the collection of data and information, analysis, monitoring of all the initiatives concerning the regional process of employment, training, economic development. The coordination of local initiatives is supported by the strengthening of the system of social concertation through the "*Strategic Agreement for Competitiveness, Internationalisation, and Employment Quality*" and the enhancement of the competences devolved to the "*Employment Pacts*", signed by local entities, trade unions and economic representatives.

### *United Kingdom*

2001 - institution of the *Department of Work and Pensions* and creation of the *JobCentres Plus - JCP* which merges the Employment Services with the Benefits Agency. In practice, JCP develop this type of service: to integrate the payment of three types of benefits (lone parents, sick and disabled and job seekers allowance) with employment services and job training. In specific terms the JobCentrePlus's mandate is: a) to help more people possible into paid work; b) to help employers fill their vacancies; c) to give people of working age the help and support they are entitled to if they cannot work. In short, the emphasis of JCP is to encourage work and to provide services that will get people into work. This objective is pursued through a network of 1.000 integrated offices as well as call centres. The offices function primarily as assessment and referral centres, and the call centres serve payment centres. Employment and job training services are subcontracted to other organisations, and Jobcentre Plus works closely with community sector agencies and health professionals to deal with the issues of housing, drug abuse, and poor health. The network of the JobCentrePlus operates close to the network of the *Regional Development Agencies - RDAs*, constituted on 1999, to promote the initiatives of economic development with the involvement of the local actors (strengthening of the regional partnerships).

### *United States*

1996 - Personal Responsibility and Work Opportunity Act

1998 - Workforce Investment Act (WIA)

With these two laws (the first a reform of the welfare system, the second a reform of the labour market) USA have promoted a strong devolution with passage of authority and competences from the federal government to the states and other entities of local government. Also the system of the territorial agencies has been strengthened. Under WIA, the federal government determines the types of programmes that they will fund, such as training and labour market exchange, the amount of dollars available, the target groups and the performance goals. State-level workforce boards develop strategies and policies that govern the administration of workforce programmes within their states but within the guidelines of the federal regulations. Local workforce investment boards (numbering more than 600) gather business and community input and try to tailor the programmes to meet their local needs. Funds flow from the federal agencies through the states to the local workforce investment boards. The local boards then subcontract with other government agencies or with non-governmental organisations to provide services that are delivered through a one-stop centre. In many states, one-stop centres house services provided

through several agencies, including WIA, Wagner-Peyser employment services, and some social service agencies. The local boards negotiate with the state and the state negotiate with the federal organisations on the performance goals for each programme within each programme year.

The network of the territorial labour agencies acts in synergy with the net of agencies named *Workforce Innovation in Regional Economic Development WIRED*, initiated recently by the US Department of Labour with the aim to encourage effective partnerships at local level. The ultimate goal of WIRED is to expand employment and advancement opportunities for workers and catalyse the creation of high-skill and high-wage opportunities. Given that one of the significant goals for WIRED is to fully align the public workforce investments with a regional economic growth agenda. One of the main weak point of WIRED initiative is due to the fact that only one of the three key federal agencies was involved in its creation – the US Department of Labour. The Department of Education and the Department of Commerce appear to be missing from the collaboration, or have a little involvement. Therefore, local partnership agencies may find it difficult to coordinate activities if and when their collaboration may run counter to the regulations and performance expectations of the federal agencies that have oversight over and provide funding for many of the workforce, education, and economic development activities.

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## **Some Perspective Notes on Regional Labour Market Monitoring**

*Alfons Schmid*

Several elements of the recent developments of regional labour market monitoring are significant. In the context of internationalisation and globalisation regions have gained further importance; in other words: regions matter. Various reasons for the increased importance of regions are cited in the literature on the new regional and geographic economics (c.f. Capello, Nijkamp (Ed.) 2004). One major reason is the importance of regions for the competitiveness of businesses and the labour force (c.f. Porter 2003; Martin 2004). Important factors for regional competitiveness include efficient regional labour markets and effective regional labour market policies.

There are at least two aspects to the importance of regions for monitoring. The first aspect concerns the need of adequate information on the regional level for a better functioning of labour markets as a whole. Furthermore, we know from new geographic economics that regions differ in that there are conditions specific to each region that influence competitiveness. The second aspect is therefore the need for region-specific information. Examples of specific aspects of each region are target groups, economic sectors etc. which can differ from region to region.

Existence of such differences among regions means that a concept of regional labour market monitoring needs to have two components, one of which specifies elements of monitoring common to all regions while the other component are comprised of flexible elements that can be adapted to specific conditions of each region. In my view, more discussions are called for to clarify the relation between the common and the flexible elements of regional labour market monitoring. What are the common elements for regional monitoring generally, and what are the flexible elements allowing the monitoring to be adapted to specific needs of a region and specific labour markets like target groups significant for labour markets? These questions could form one focus of the network of regional labour market monitoring, which should be discussed in more detail.

We know from institutional and information economics that labour markets are imperfect and there are market failures (c.f. Williamson 1985; Stiglitz 2004). These imperfections and market failures, e.g. imperfect information, imperfect mobility, imperfect property rights, externalities etc., reduce the efficiency of regional labour markets and the effectiveness of regional labour market policies.

Concerning information there are many initiatives aimed at offering adequate labour market information on a regional level to reduce mismatches. For most European regions such information is available for past developments and the present situation. Because of increasing regional competition, there is, in my view, a need for more information about future labour market developments on the regional level. Such medium term regional forecasting should generate information on regional employment developments on the supply side as well as on the demand side. The projection of regional employment situation can be differentiated according to sectors, occupational groups, qualifications, skills, etc. Results of the development on the supply and the demand sides will be contrasted so that mismatches become manifest and actions to reduce future problems can be undertaken right away.

For most regions past and present information on regional labour markets is available. Therefore, regions will hardly gain more competitiveness over others by being provided with this information. Adequate information on the future developments, on the other hand, enables regional actors to react in time on excess supply or excess demand of regional labour force both in quantity and in quality. Adequate measures to reduce such future mismatches in time include adequate apprenticeship and further education, among other things. Therefore, having information on future developments earlier than others will be a competitiveness factor in regions that provide forecast for the regional employment developments and the qualification demands derived from that.

For a monitoring system this means that the generation and delivery of information about the regional employment situation needs to be broadened to include information of future developments. It is well known that forecasting employment developments for a small region for the medium term is more difficult than doing the same at a national level. As is known, there are several methods for regional forecasting, ranging from a simple trend extrapolation to neural networks (c.f. Knobel, Kriechel, A. Schmid (Eds.) 2008). From a practical point of view we should focus on a concept of regional forecasting that is not complicated and practically convenient, one that has correct results and can be used to forecast several aspects of the regional employment developments. It should be applicable for several regions in Europe. This implies that not only the concept of forecasting should be flexible but also that the data basis for regional forecasting in several regions has to be taken in account. In my opinion, in the long run, a viable European method of regional employment forecasting and an adequate data basis should be developed.

Such a European concept of medium term forecasting of regional employment developments should combine several concepts of regional forecasting (c.f. *ibid*). A possibility would be to combine a bottom-up with a top-down approach, as well as to connect quantitative with qualitative data and methods. Statistical approaches make projections from past developments into the future. This method assumes structural conditions in the past will not change in the future.

But projecting past developments into the future cannot account for new developments. There are empirical findings that support the assumption that structural changes slowly occur on a regional level (c.f. for example Bade 2006). But there is also evidence that new developments will occur, sometimes slowly, sometimes suddenly. Such structural changes have strong influences on employment developments in the regions. Therefore it seems necessary to extend the quantitative forecasting concept by including qualitative methods. This has to aspects. The first one concerns the evaluation of the results of statistical forecasting. The second one concerns new developments of skills, occupations, etc. One method for obtaining information about these new developments would be an expert panel (c.f. Crass, Knobel, A. Schmid 2008). With a panel of regional experts the results of quantitative statistical methods can be evaluated. Experts can also give information concerning future developments of new qualifications, new occupations, etc. The results of the combined forecasting – i.e. those obtained by quantitative statistical methods together with qualitative projections of structural changes – will offer additional information about future employment developments on a low regional level for regional actors.

But even if adequate information exists, it need not be certain that this information leads to the “correct” knowledge and to rational decision. The reason lies in human beings’ limited ability to absorb all the information provided in the right way. Therefore, a learning process is needed to transform information to knowledge. This learning process may differ among different regions. Nonetheless, transferring information to regional actors is a necessary condition for a monitoring system. Only with this demand orientation will information

become knowledge for regional actors. Therefore, both information and communication channelled by a learning process are necessary for regional labour market monitoring. Deepening existing regional learning processes would consequently be another way to improve regional labour market monitoring.

We also know from information and institutional economics that information is partly a public good and it involves external effects. Therefore, private and public costs and benefits differ. This means that regional intermediaries that generate and diffuse adequate information for actors on labour markets are needed. In this field more actions are needed to establish a well functioning regional labour market monitoring.

Even if actors had the “correct” knowledge from information given to them, this does not necessarily lead to “right” decisions and actions (c.f. Haase 2004, 71). The functioning of regional labour markets and the effectiveness of regional labour market policy still may not improve and increase, even if there exists the information needed and this information has been translated to knowledge for regional actors. In a world of perfect rationality, information is translated into “correct” decisions and “correct” actions without any costs. But in a world of imperfect information, the step from knowledge to decision and adequate actions is influenced a number of things ranging from individual attitudes to social institutions. I would like to suggest that a regional labour market monitoring programme should be open to including decision and action. On the one hand information and knowledge that do not lead to adequate decisions and actions may have limited importance. On the other hand it may be very difficult to take into account the variety of influences on actions. From a monitoring point of view evaluation of the functioning of regional labour markets and the regional labour market policy, based on the information and knowledge by an established monitoring system, might be a way to incorporate decision and action into monitoring without making such a monitoring too complicated.

It follows from these sketches that in order to improve the efficiency of regional labour markets and to increase the effectiveness of regional labour market policies, it is crucial to communicate information (including the forecasting of future developments) to actors in order to produce new knowledge. These two elements – information and communication – should be supplemented by evaluation as an instrument for improving the adequacy of decisions and actions. An intermediary monitoring system has to encompass these elements - information, communication, and evaluation - in order to reduce imperfect information and increase knowledge through communication and to produce “right” decisions and actions on the part of labour market actors.

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**Abstract**

Christa Larsen / Waldemar Mathejczyk / Jenny Kipper / Alfons Schmid (Eds.) (2008):  
Target Group Monitoring in European Regions. Empirical Findings and Conceptual  
Approaches. Rainer Hampp Verlag. München and Mering. Germany.

Target Group Monitoring is a regional approach to generate data that cover adequately the information needs of labour market actors. Approaches from different European regions are presented in this book, applied onto migrants as a target group of labour market politics. Furthermore, the central elements of these approaches are discussed with respect to their suitability for other target groups, such as older or young employees, low-skilled and skilled workers. Finally, methods and techniques are considered to provide a wide scope of information in combining target group and branch/industry approaches.

This book was developed by several members of the European Network of Regional Labour Market Monitoring.

Key Words: Regional Labour Market - Target Group Monitoring - Regional Information

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