LABOUR MARKET INTELLIGENCE SOURCES
Country fiche - ITALY

Author: Roberto Boselli, Chiara Grosso
Date of Release: 05-01-2023

LMI-EUniv Erasmus+ KA2 Project 2021-1-RO01-KA220-HED-000032249

TABLE OF CONTENTS

LIST OF ABBREVIATIONS

CEDEFOP	European Centre for the Development of Vocational Training
EU	European Union
HEI	Higher Education Institution
ILO	International Labour Organisation
LMI	Labour Market Intelligence
LMI-EUniv	Innovating the use of Labour Market Intelligence within European Universities
LMO	Labour Market Observatory
NIS	National Institute of Statistics
OECD	Organisation for Economic Cooperation and Development
OJA	Online Job Advertisement
OVATE	Skills Online Vacancy Analysis Tool for Europe (Skills OVATE)

BACKGROUND

LMI-EUniv project

"Innovating the use of Labour Market Intelligence within European Universities - LMI-EUniv", the project was the subject of a successful application to Key Action 2 – Cooperation among organisations and institutions – of the Erasmus+ programme.

Consortium

The consortium is composed of West University of Timisoara (project leader), University of Milano-Bicocca (Italy), University of Tallinn (Estonia), Prospektiker - (Spain) and Luxembourg Institute of Socio-Economic Research (Luxembourg).

Aims

The primary focus of the project is to understand how are European Universities using labour market information and labour market intelligence in the planning and delivery of their provision and how can this be improved. Therefore, the project aims to help HEI to develop appropriate skills and competencies through better matching of education supply to demand through innovative learning and teaching practices.

Objectives

The LMI-EUniv project has three main objectives: (1) to map essential LMI sources at national level, (2) to explore how HEI in Europe are using LMI, and (3) to produce a training course, guide and a Labour Market Intelligence Hub. This will be an online platform, aggregating LMI sources and information, and aims to become a reference point for all HEI.

INTRODUCTION

This country fiche provides information concerning the essential LMI sources at national level with a particular focus on LMI sources used by HEI. It was developed within the Intellectual Output 1 of the LMI-EUniv project – Mapping essential LMI sources at national level. The role of the country fiches is to systemize information related to LMI sources and gather them into a LMI Hub. The country fiches will form the basis for the Data (Evidence) Report and in turn, will inform the production of the Final Report.

During the inception phase of the project, we have noticed the existence of a large number of LMI sources but also a lack of information about them. We consider that having access to a single point of information with LMI sources will enable HEI to better use this for their activities. Thus, this research represents the first step in this direction through mapping the LMI sources at the European level.

We believe that this study is the first of its kind focused on LMI sources across Europe and is in itself a considerable innovation. Through this activity, we are seeking to influence how universities in Europe view, analyse, utilise and produce their own LMI to aid with their decision-making. Further, we aim to make this available to help stakeholders such as policymakers in national and regional governments, employers, and regional development agencies to be better able to bring their demand-side knowledge to support universities and ensure higher education supply fits to current and future labour market need.

The Final Report Recommendations given the project's geographical coverage and the pressing need for action on using labour market intelligence should have considerable transferability potential.

GENERAL INFORMATION

Demography

The Italian territory, with the exclusion of Republic of San Marino and Vatican City State, covers an area of 302 068 square km. The territory is made up of 35.2% of mountains, 41.6% of hills and 23.2% of plains. The 49.1% of the population lives in plain areas, the 38.8% on the hills and only the 12.1% on the mountains. At 1st January 2020, residents in Italy were 60 244 639 (29 340 565 males and 30 904 074 females), approximately 190 000 residents less than the previous year. In 2019, the birth rate continued to fall (- 19 577 births), with births equal to 420 170. Foreign residents at 1st January 2020 were 5 306 548 (8.8% of the total resident population). The majority of foreign citizens come from EU countries (29.9%), whereas the highest number of non-EU migrants come from central-east Europe (19.5%) and Northern Africa (13%). At 1st January 2020, the ratio between old population aged 65 and over and population aged 0-15, was equal to 178.4%, with a steady increase compared with the previous years.

The aging process concerns the whole national territory; however, the aging rate is higher in the Centre and in the North (187.9%), whereas it is lower in the South with the lowest percentage in Campania (134.7%) which is the 'less old' region of the country[1].

In the third quarter of 2022, although at a slowly trend compared to the previous quarter, the growth trend in the number of employed people continued (+247 thousand, +1.1% in one year); the employment rate of people aged between 15 and 64 reached 60.3% (+1.1 points) see Table 1.

---

[1] EUROSTAT, https://national-policies.eacea.ec.europa.eu/youthwiki/chapters/italy/overview, and https://eures.ec.europa.eu/living-and-working_en

Table 1. Occupational rate individual from 15 to 64 yrs old

Categories	Unemployment Rate (%)		
	Women and Men	Men	Women
Tot	**60,3**	**69,7**	**50,9**
Country			
North	68,2	75,7	60,7
Center	65,1	72,4	57,9
South	46,7	60,1	33,6
Age			
15-34 years old	44,0	50,5	37,2
15-24 years. old	*20,6*	*24,7*	*16,3*
25-34 years old	*66,0*	*75,1*	*56,5*
35-49 years old	75,2	86,5	63,9
50-64 years old	61,7	72,7	51,3
Citizen			
Italian	60,2	69,1	51,2
Foreign	61,0	75,1	48,1
Education			
Secondary school	45,9	58,5	31,6
High school	65,2	75,2	55,1
University	78,5	83,8	74,7

Source: Labour Force Survey

Labour market

The Italian labour[2] market differs widely between the regions. Industrial activity is mostly concentrated in the north, while people in southern regions mainly work in agriculture and tourism. The most typical sectors in order of GDP size (2021) are: services (GDP EUR 281 264 million), manufacturing (GDP EUR 76 359 million), construction (GDP EUR 20 261 million), agriculture (GDP EUR 7 729 million). The most common type of contract on offer is fixed-term (55.5%) and full-time. The qualification most requested is an upper secondary school diploma.

The last few years have seen a steady decline in the Italian population to a historical low in January 2022, with a total of 58 983 122 people residing in Italy. The number of people with foreign citizenship stands at around 5 193 000 (8% of the population) with a higher concentration in north-western regions. 46.3% of Italians reside in northern Italy, 19.8% in central Italy and 33.8% in the south and islands. The most populous regions are Lombardy, Veneto, Lazio, Campania and Sicily. However, the demographic crisis is most evident in southern Italy, particularly in Molise, Basilicata and Calabria.

After the negative effects on the economy caused by the pandemic, 2021 saw higher-than-expected GDP growth (+ 6.2%) and a continuous improvement in the employment situation until pre-crisis positions were restored. Compared to March 2021, the number of jobseekers decreased in March 2022 (- 16.6%) and the inactivity rate fell to pre-pandemic levels (34.5%). The unemployment rate stands at 8.30% compared to 9.3% in October 2021, while youth unemployment stands at 24.5% compared to 27.6% in October 2021. Unfortunately, as at January 2022, the percentage of NEETs (aged 15-29) is still among the highest in Europe (23.10%). Since April 2021, the labour force participation rate has increased by 1.2% to 65.5% in March 2022.

Since the outbreak of the war in Ukraine, the Italian economy has experienced signs of slowdown due to the uncertain outlook and the energy and raw material supply crisis. The sector showing the greatest reaction is the services sector, which recorded strong growth in

---

[2] EUROSTAT, https://national-policies.eacea.ec.europa.eu/youthwiki/chapters/italy/overview and https://eures.ec.europa.eu/living-and-working_en

May 2022 (+ 30% compared to the previous month), due in particular to the recovery of the tourism sector. The manufacturing and construction sectors have slowed down (- 4.4% and - 0.9% respectively), especially when compared to one year ago (- 18.8% and - 27.5% respectively).

The latest forecasts produced by the Excelsior Unioncamere/ANPAL Information System show a need for 1 531 450 workers for the period May to July 2022. Most of these (1 209 060) are required by the services sector (particularly business, tourism and catering services), followed by industry with 322 400 expected new hires, mainly in the manufacturing and public utilities sectors. The provinces recording the highest revenues are Rome, Milan and Naples, while those offering the most opportunities for young people are Trieste, Reggio Emilia and Cuneo.

A total of 444 310 new hires are expected for May 2022, of which most (126 690) will require a secondary education qualification. The most difficult roles to fill, however, are those requiring a tertiary level of education (45.5% of vacant posts), particularly in the field of dentistry (68.6% vacant posts), healthcare and paramedical fields (58.9%), and mathematical, physical and computer sciences (58.5%). These are followed by roles requiring a vocational qualification or diploma (43.5% of vacancies), particularly in the textile and clothing sector (72%), motor vehicle repair (68.8%), electricians (57.3%) and the well-being sector (56%). Roles that are difficult to fill requiring a secondary education level account for 39.3% of the total. Most jobs are available in the fields of mechanics, mechatronics, and energy (62.1%); electronics and electrical engineering (47.2%); IT and telecommunications (46%), and industrial and craft production and maintenance (45.2%).

Green Economy and new job

Investments stemming from the National Recovery and Resilience Plan (NRRP) will be important for the recovery of the Italian economy. In particular, ecological and digital transition actions will increase the demand for jobs in the green economy, IT and telecommunications sectors ('green jobs'). The NRRP earmarks 37% of investment and reform expenditure to support climate objectives, and 20% to support the digital transition.

The budget for the green revolution and the ecological transition is EUR 59.46 billion. This covers the circular economy and sustainable agriculture (EUR 5.27 billion), renewable energy

and sustainable mobility (EUR 23.78 billion), energy efficiency and building renovation (EUR 15.36 billion), and land preservation (EUR 15.05 billion). These investments will drive growth in employment across many economic sectors, but particularly in mechatronics (especially electricity and electronics), agri-food, fittings and construction. New sectoral supply chains will also be able to develop as resources are dedicated to technologies related to hydrogen, satellites, microelectronics, the development of a European battery industry, and the strengthening of cybersecurity and the Cloud. Finally, a new supply of goods and services will be developed in many segments, with primarily green and digital products, digital services related to telemedicine, smart mobility, electric cars, and sustainable mobility.

The greatest demand for green jobs will be in the following areas: for the construction sector, sustainable architects, designers of sustainable buildings and installers of low environmental impact air-conditioning systems; for mechanics, experts in electric motor systems and/or component technologies; for the environment, environmental IT specialists to develop environmental software and applications, environmental lawyers, mobility managers, energy managers and eco-designers. In addition, the number of professionals required with a mix of at least two e-skills (i.e. basic digital skills, ability to use mathematical and IT languages and methods and ability to manage innovative solutions) is estimated at between 875,000 and 959,000, more than 20% of the total. These include software analysts and designers, electronic and telecommunications engineers, programming technicians and network and telematic system operators.

Higher education market

According to law 240/2010, universities are the primary seat of free research and free training and are a place of learning and critical elaboration of knowledge. In the implementation of the provisions set in the Constitution, each university shall operate on the basis of principles of autonomy and responsibility, combining research and teaching for the cultural, civil and economic progress of the country.

The institutes that belong to the university system are:

- State universities
- non-State recognised universities

- non-State recognised online universities
- higher schools for language mediators and specialization institutes for psychotherapists

According to the DPR 212/2005, AFAM institutions (Alta formazione artistica, musicale e coreutica - AFAM) carry out production and research activities in the artistic field, in particular the fine arts, music, choreography, drama and design, in order to promote the achievement of educational objectives and the pursuit of high artistic and professional standards.

The institutions belonging to the AFAM system are:

- State academies of fine arts (Accademie di belle arti statali)
- recognised non-State academies of fine arts (Accademie di belle arti non statali riconosciute)
- higher institutes for artistic industries (Istituti superiori per le industrie artistiche - ISIA)
- conservatoires (Conservatori)
- the National academy of drama (Accademia nazionale d'arte drammatica)
- the National dance academy (Accademia nazionale di danza)
- the officially recognised music institutes
- other institutions authorised to release recognised qualifications

Institutions belonging to the university and AFAM systems organise programmes of the first, second and third cycle of the Bologna Process structure (corresponding to the ISCED 6, ISCED 7 and ISCED 8 levels, respectively). In addition, universities and AFAM institutions may organise courses leading to other qualifications outside the Bologna structure. All the relevant qualifications are described in the NQF. Qualifications issued by universities and AFAM institutions are also described in the Italian qualification framework of higher education (Quadro dei titoli italiani dell'istruzione superiore - QTI).

The providers of Higher technological education are the Higher technological institutes (Istituti tecnologici superiori (ITS Academies), from now on referred to also as ITSs) that are specialised tertiary institutions established to meet the demand of new and high-level competences coming from the labour world, in particular the technological sectors. ITSs have recently been reformed (law 99/2022). Main changes are described in the chapter on ongoing

reforms in higher education, awaiting the decrees that are to define the organisation of the courses.

Institutions of the university and AFAM systems as well as ITSs, have legal status and statutory, teaching, scientific, administrative, financial and accounting autonomy. They establish the organisation of the academic year, which, in general, starts on the 1st of November and ends on the 31st of October of the following year and is usually organised in semesters.

Besides universities, AFAM institutions and ITSs, other institutions offer courses leading to a qualification equivalent to a second-cycle qualification issued by universities (DM 87/2009). Among them: the Higher institute for the conservation and restoration (Istituto superiore per la conservazione e il restauro) in Rome, the School of the Gemstone Factory (Scuola dell'Opificio delle pietre dure) in Florence, with its branch in Ravenna at the School of Restoration of the Mosaic (Scuola di retauro del mosaico), the Higher school at the Central institute for the pathology of archives and books (Istituto centrale per la patologia degli archivi e del libro) in Rome. In general, access to courses requires an upper secondary education qualification and an entrance examination. The number of places available is limited and fixed annually. In some cases, also a previous relevant training is required. These institutes fall within the responsibility of the Ministry of culture instead of the Ministry of university and research and, therefore, their offer will not be described in this chapter.

LMI SOURCES AT NATIONAL LEVEL

LMI providers

LMI comprises any information and knowledge about labour market dynamics. It covers topics such as labour demand and supply, unemployment, employment and earnings, emergence of new occupations, new skills required on labour market, post-graduate path, career expectations, etc.

List of potential providers:

- National institute of statistics
- Public employment service
- Ministry of labour
- Ministry of education
- Employer organizations, employees organizations (Chamber of employees), trade unions and professional associations
- Academic and research institute
- Private and public centres of lifelong learning
- Private providers (e.g. job portal, Inomics, AKADEUS ….)

National Institute of Statistics

The National Institute of Statistics (ISTAT)- a public research body - is the main producer of official statistics. It operates in full autonomy, in continuous interaction with the academic and scientific world. Founded in 1926, the Institute has constantly followed, measured and analyzed the collective phenomena and the fundamental stages that have transformed Italy. Since 1989, Istat has played a coordinating role within the National Statistical System (Sistan). The Institute is also engaged in the development of the European Statistical System and in strengthening the partnership with international statistical bodies. Istat's statistical production activity is established by the European Statistical Program (Pse) and by the National Statistical Program (Psn). The statistical production criteria are defined by the European

Statistics Code and the Official Statistics Quality Code and are inspired by the fundamental principles of the UNECE.

Ministry of Education

The Ministry of Education and Merit (https://www.miur.gov.it/) is assigned the functions and tasks pertaining to the State in the field of school education, university and higher artistic, musical and dance training, scientific and technological research.

In these three main channels of intervention, except for areas of competence reserved to other entities and bodies, the Ministry also carries out functions of regulation, support and enhancement of the autonomy recognized to scholastic, university, AFAM and research institutions.

AlmaLaurea

AlmaLaurea Interuniversity Consortium together with AlmaLaurea srl are the mainstays of a system centered on students and graduates at all stages of their educational history: guidance, learning, work. A synergy at the service of universities, companies and institutions, with our annual and thematic reports, CV database, placement and intermediation services. Since 1994 AlmaLaurea has been monitoring, mapping and supporting Italian universities: what degree and post-degree courses are offered, what are the professional opportunities they lead to and what are the outcomes. We can thus draw a picture, in continuous evolution, of the way in which our country changes, in relation to the world of studies and the world of work. Today AlmaLaurea represents 78 universities. More details are available at (https://www.almalaurea.it/) and Competenze e lavoro (https://www.almalaurea.it/orientamento/strumenti-orientamento-universitario/piattaforma-competenze-lavoro).

Unioncamere

The Italian Union of Chambers of Commerce, Industry, Crafts and Agriculture (https://www.unioncamere.gov.it/) - is the public body that unites and institutionally represents the Italian chamber system. Founded in 1901, it creates and manages services and activities of interest to the Chambers of commerce and economic categories, coordinating the initiatives of the System through directives and addresses to the bodies that are part of it. For the

exercise of the functions and tasks entrusted by law to chambers of commerce, Unioncamere stipulates program agreements, understandings and conventions with central state administrations, national or local public bodies, promoting and supporting the link between the chamber system and business organizations , consumers and workers. At European level, it ensures the representation of the Italian Chambers of Commerce within Eurochambres, the association that brings together the chamber systems of Europe.

INAP

The National Institute for the Analysis of Public Policies (INAPP - https://www.inapp.org/it) is a public research body which carries out analyses, monitoring and evaluation of employment policies and employment services, education and training policies, social and all those public policies that have effects on the labor market. he goal of INAPP is to contribute to the scientific, economic and social development of Italy. The research activity of the Institute is aimed at studying phenomena of strategic importance for the community, to provide information, knowledge and tools useful to policymakers to make their own choices and to citizens to evaluate the impact of these choices. All of this also means building public goods such as databases for the world of research and for those called upon to make decisions in favor of the community.

Assessing the sources of LMI at national level

Once the sources of LMI have been identified, their quality is needed to be assessed. There are many organisations that produce LMI but only through a standardized evaluation process they can be considered as being qualitative. The quality of LMI sources is sustained by their representativeness, validity and reliability.

Table 1 below contains a list of LMI sources identified at national level and their rating in accordance with LMI-EUniv methodology.

Table 1: LMI Sources at national level

SEE THE LMI SOURCES HERE

REFERENCES

Living and working in Europe (2023). URL: https://eures.ec.europa.eu/living-and-working_en Accessed 15 January 2023]

YouthWiki (2023). URL: https://national-policies.eacea.ec.europa.eu/youthwiki/chapters/italy/overview [Accessed 15 January 2023]

Pânzaru C., Brandas C. Filip F. (2016). Data Driven Decision Support Systems: An Application Case in Labour Market Analysis. Romanian Journal of Information Science and Technology, 19.1-2

Pânzaru, C. Brandas, C. (2017). A Conceptual Model of Collaborative Support Sistem for Labour Market Governance. In the Importance of Governance in Regional Labour Market Monitoring for Evidence-based Policy-making, Christa Larsen, Sigrid Rand, Alfons Schmid, Tilman Nagel, Heike Hoess (Eds.). Rainer Hampp Verlag, Augsburg, München

LMI EUniv

Innovating the use of Labour Market
Intelligence within European Universities

2023