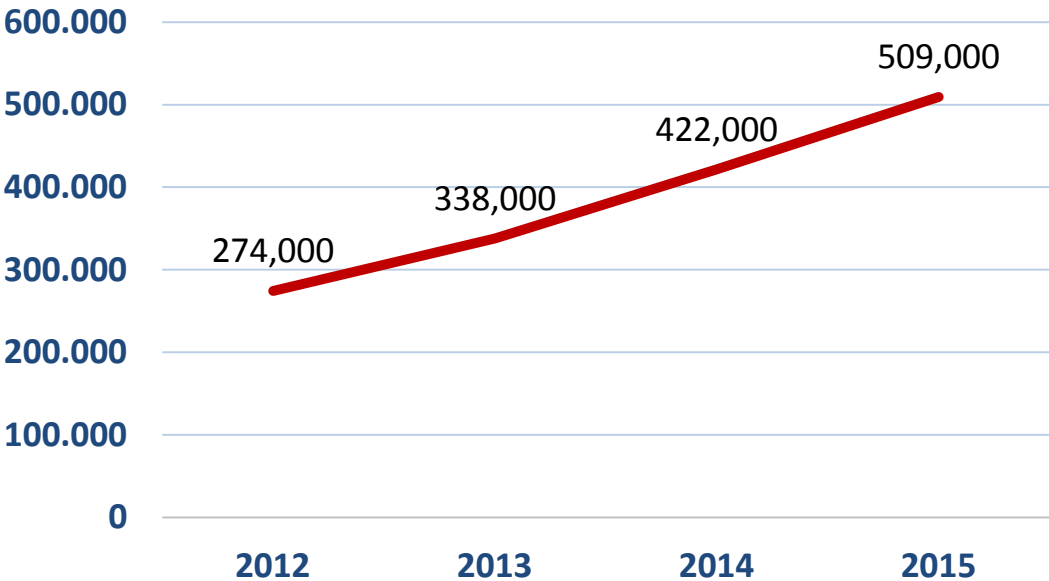


Growing e-Skills Gap: More than 500.000 vacant ICT jobs in Europe by 2015

Brussels 10 December 2013 - Over 300 experts from all over Europe attended the "European e-Skills 2013 Conference" organized by the European Commission on 10 December 2013 in Brussels. There are currently 274.000 vacancies for ICT jobs in Europe. This number is going to grow up to 509.000 potential job vacancies in Europe in 2015. Up until 2020 the figure could - depending on the foresight scenario taken - grow to 750.000 or even 1.38 million. These are potentially new jobs which could be created which the market would be ready to absorb and which using appropriate measures European national governments and industry have the possibility to create.

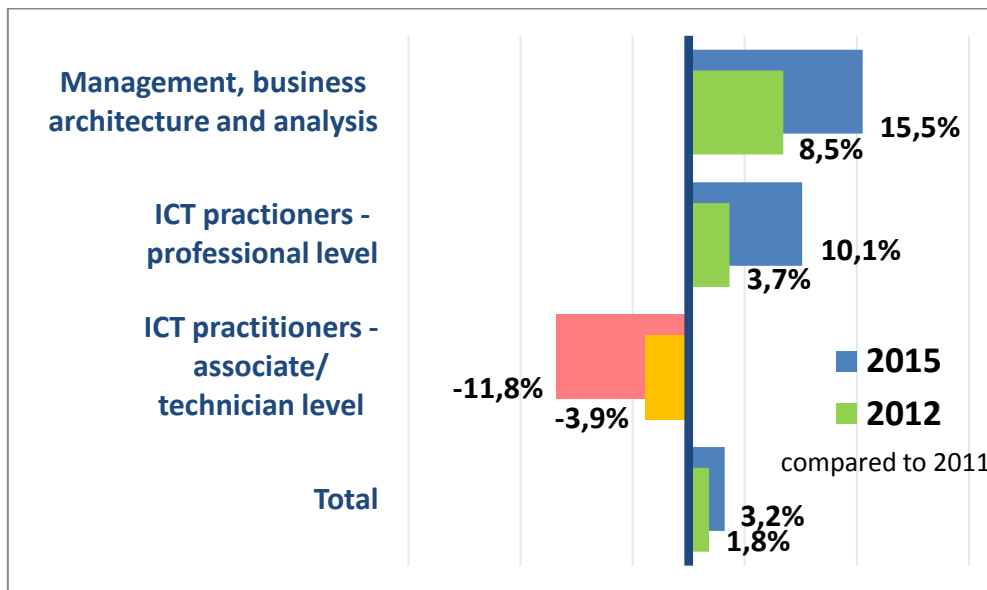
Figure 1:
ICT job vacancies 2012 – 2015 in Europe



Source: Eurostat LFS, IDC Europe. empirica calculations and forecasts (Gareis, K., Hüsing, T., Bludova, I., Schulz, C., Korte, W.B.: e-Skills: Monitoring and Benchmarking Policies and Partnerships in Europe (Final Report for the European Commission, forthcoming December 2013)

Research from empirica commissioned by the European Commission shows that job growth is largest in highly skilled jobs such as those relating to Management, Architecture and Analysis positions, where also e-Leadership skills are required. These are usually recruited from the seasoned ICT practitioner pool and other (non-ICT) managers. While the overall ICT workforce has grown by 2% in just one year from 2011 to 2012 and is likely to grow by 3% by 2015. Already this figure is impressive but when only focusing on ICT practitioner skills the growth rates are even higher with currently 4% and 10%, by 2015. The by far highest and top growth rates are going to be achieved for those ICT jobs at management, business architecture and analysis level. Here possible growth rates are five times as high as the overall average. In the last year their number has increased by an impressive 9%, a figure which will further grow up to 16% until 2015.

Figure 2:
ICT workforce development 2011 – 2012 and expected development until 2015 by ICT job categories in Europe



Source: Eurostat LFS, IDC Europe. empirica calculations and forecasts (Gareis, K., Hüsing, T., Bludova, I., Schulz, C., Korte, W.B.: e-Skills: Monitoring and Benchmarking Policies and Partnerships in Europe (Final Report for the European Commission, forthcoming December 2013

For ICT technicians – likely to be faced with job reductions – we need to develop appropriate skills for upgrading their skills in order to make them resistant to changes occurring from developments like automation and off-shoring. It is the latter two areas – ICT practitioners and ICT jobs at management, business architecture and analysis level - where Europe has the potential to create a large number of jobs urgently needed in the market and which are sustainable in the long-term. Ultimately the challenge is not only employability, but also to create a pool of talent to assure the European workforce of the future. This does not only include ICT practitioners but very importantly also those best described as e-Leaders who are able to inspire, motivate and guide multi-disciplinary teams of professionals to use ICT to creatively exploit digital opportunities for business innovation and stakeholder value.

EU Member States are increasingly addressing e-Skills shortages

Brussels 10 December 2013 - Governments are significantly increasing their efforts to address the skill shortage through dedicated policies, initiatives and partnerships. This was a key message from the conference where the results of an analysis of national policies on e-skills, e-leadership skills and digital literacy carried out in all EU Member States were presented for the first time. Compared to a previous assessment released in 2010 the e-skills activity index measuring national policy and stakeholder activity by assessing national policies and initiatives in the e-skills domain has increased between 2009 and 2013 from 2.4 to 2.9 (on a 5 point scale). Among the EU Member States we find countries showing high or even very high levels of activity. Of the 27 Member States, 12 have a value of 3 or higher on the 5-point index scale for e-Skills activity.

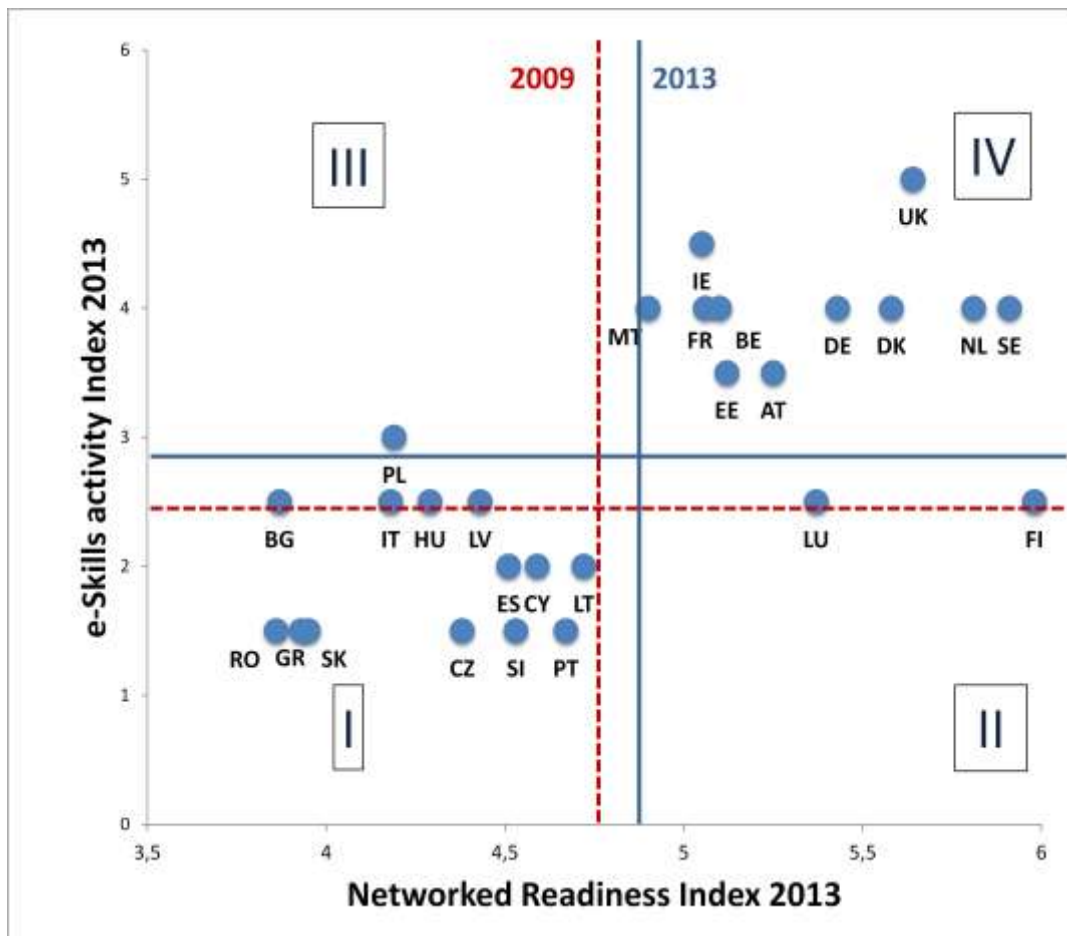
Figure 3:
e-Skills Activity Index:
Level of policy and stakeholder activity on e-skills in Europe in 2009 and 2013

Country		2013	2009	Evolution
AT	Austria	●●●● 3.5	●● 2.0	+1.5
BE	Belgium	●●●● 4.0	●●●●● 4.5	-0.5
BG	Bulgaria	●●● 2.5	●● 1.5	+1.0
CY	Cyprus	●● 2.0	●● 1.5	+0.5
CZ	Czech Republic	●● 1.5	●● 1.5	0.0
DE	Germany	●●●● 4.0	●●●● 3.5	+0.5
DK	Denmark	●●●● 4.0	●●● 2.5	+1.5
EE	Estonia	●●●● 3.5	● 1.0	+2.5
EL	Greece	●● 1.5	●● 1.5	0.0
ES	Spain	●● 2.0	● 1.0	+1.0
FI	Finland	●●● 2.5	●● 1.5	+1.0
FR	France	●●●● 4.0	●●● 3.0	+1.0
HU	Hungary	●●● 2.5	●●●● 3.5	-1.0
IE	Ireland	●●●●● 4.5	●●●● 4.0	+0.5
IT	Italy	●●● 2.5	●● 1.5	+1.0
LT	Lithuania	●● 2.0	● 1.0	+1.0
LU	Luxembourg	●●● 2.5	●● 1.5	1.0
LV	Latvia	●●● 2.5	●●● 3.0	-0.5
MT	Malta	●●●● 4.0	●●●● 4.0	0.0
NL	Netherlands	●●●● 4.0	●●● 3.0	+1.0
PL	Poland	●●● 3.0	●●● 2.5	+0.5
PT	Portugal	●● 1.5	●● 1.5	0.0
RO	Romania	●● 1.5	●●● 2.5	-1.0
SE	Sweden	●●●● 4.0	●●● 2.5	+1.5
SI	Slovenia	●● 1.5	●● 1.5	0.0
SK	Slovak Republic	●● 1.5	●● 2.0	-0.5
UK	United Kingdom	●●●●● 5.0	●●●●● 5.0	0.0

Source: empirica 2013 (Gareis, K., Hüsing, T., Bludova, I., Schulz, C., Korte, W.B.: e-Skills: Monitoring and Benchmarking Policies and Partnerships in Europe (Final Report for the European Commission, forthcoming December 2013)

The most committed and active countries include the United Kingdom and Ireland. Belgium, Germany, Denmark, France, Malta the Netherlands and Sweden also perform strongly in terms of the level of activity for ensuring adequate supply of ICT practitioners on the labour market today and in the future. The range of interventions used is very broad. There are clear indications that the EU Communication on "e-Skills for the 21st Century" and more recently the launch of the "Grand Coalition for Digital Jobs" by President Barroso in March 2013 have triggered Member States to engage in public debates about the e-skills issue and helped them to develop appropriate responses. However, the degree of integration and consistency of policy-making is still limited in several Member States. Most countries lack a master strategy or the topic still does not attract continuous attention in policy-making across the different policy areas concerned. It is striking that especially those European countries showing significant levels of activity in the e-skills domain have the highest share of ICT workers in their workforce and at the same time rank highest on innovation and competitiveness indices like the Networked Readiness Index (NRI) which measures economic capacities to fully leverage ICT for increased competitiveness and development.

Figure 4:
e-Skills policy activity and ICT-based competitiveness in Europe 2013



Source: empirica 2013 (Gareis, K., Hüsing, T., Bludova, I., Schulz, C., Korte, W.B.: e-Skills: Monitoring and Benchmarking Policies and Partnerships in Europe (Final Report for the European Commission, forthcoming December 2013)

There are further positive signals since those countries which could be described as ‘low performers’ have started to become active with two of them (Lithuania and Poland) having just started national e-skills programmes as national Grand Coalitions for Digital Jobs as part of the European Commission initiative with the same name. 10 further Member States mainly from Southern and Eastern Europe are lined up for also launching such national programmes.

e-Leadership skills are entering the European policy agenda

Brussels 10 December 2013 - Initiatives in several EU Member States are emerging but higher education offers in this domain are scarce and do not yet exist. The skills in focus and described as e-leadership skills are those which enable people to lead qualified staff from different disciplines towards identifying and designing business models and exploiting key innovation opportunities, making best use of developments in ICT and delivering value to their organisations. However, policy developments in this domain are still in their infancy, though, with the exception of Denmark, Germany, Finland, Malta, the Netherlands and the United Kingdom. Higher Education programmes and courses at universities and business schools are scarce to non-existent. An on-going European Commission research activity revealed that from more than 1000 programmes identified and analysed only around 20 bear the potential for an e-leadership programme in the future since they are programmes at post graduate level combining ICT and business, targeted at those with professional experience – not full-time on site -, aimed at senior management with very high

technical standard and having as an entry requirement significant business experience and a mission to transform business.

Feedback from the conference audience was very positive in so far as they agreed to the urgent need for Europe to quickly tackle the emerging e-leadership issue and mobilise all relevant stakeholders in a joint Europe-wide initiative for developing suitable e-leadership Higher Education programmes which meet the needs of industry not only large corporations but very importantly also those of SMEs and entrepreneurs who account for the vast majority of jobs in Europe. These need to be accompanied by associated national policies and initiatives in which they are embedded. It is against this background that the European Commission will in January 2014 launch a pan-European communication and awareness raising campaign "e-Skills for Jobs" and a new e-Leadership initiative focusing on entrepreneurs, managers and advanced ICT users in SMEs, start-ups and gazelles which will be complementary to the already on-going one on European e-Leadership curricula guidelines.

More on the website of the European e-Skills 2013 Conference (<http://eskills2013.eu>)

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