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BASQUE REGIONAL REPORT OF LABOUR MARKET'S CHARACTERISTICS AND SUMMARY OF CHALLENGES AND OPPORTUNITIES.

**REPLAY-VET - *Strengthening key
competencies of low- skilled people in vet to
cover future replacement positions***

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SECTION 1. CHARACTERISATION OF THE LOW SKILLED LABOUR MARKET IN THE BASQUE COUNTRY

1.1. Social and labour characterisation of population with low qualification

Analysis of the Basque labour market in comparison to EU 28

LABOUR MARKET BASIC INDICATORS	EU 28		BASQUE COUNTRY	
	2015	Δ 08-15	2015	Δ 08-15
Population on 1 January (000)	508.504	2%	2.165	0,3%
Population between the ages of 15-64 (%)	66%	-1%	67%	-6%
Total occupation (000)	220.890	-1%	17,8	-13%
Employment rate(%population age group 20-64)	70	0%	67	-7%
Employment rate(%population age group 15-64)	65,6	0%	62,9	-7%
Employment rate(%population age group 15-24)	33	-12%	16,4	-49%
Employment rate(%population age group 25-54)	78	-2%	74,46	-8%
Employment rate(%population age group 55-64)	53,3	17%	51,3	14%
Full time employment rate (%population age group 20-64)	56,0	-4%	55	-11%
Self-employment (%total occupation)	13,8	-12%	13,8	-13%
Part-time employment rate (%total occupation)	19,6	8% (*)	18,4	37%
Fixed term contract (%total employees)	14	-1%	23,4	-20%
Employment in services (%total occupation)	71	1%	72,4	14%
Employment in Industry (%total occupation)	24,2	-1%	26,4	-23%
Employment in Agriculture(%total occupation)	4,2	-22%	1,3	-54%
Economic activity rates(%population 15-64 age group)	72,5	3%	73,9	2%
Economic activity rates(%population 15-24 age group)	41,5	-6%	27,6	-31%
Total Unemployment (000)	2 2.898	36%	151,9	112%
Unemployment rate(% active)	9,4	34%	14,8	124%
Youth Unemployment rate (%active 15-24 year group)	20,4	28%	40,4	107%
Long-term unemployment rates (%active)	4,5	73%	9,4	350%
long-term unemployment (% total unemployment)	48,3	30%	63,6	77%
Youth Unemployment rate (%population 15-24 age group)	8,2	19%	12,4	100%
Employment rate of the population with low qualification 25-64 años(ISCED 0-2)	52,6	-7% (*)	27,2	

(*) Variation 2008 - 2014.

Source: EUROSTAT and INE. Regional statistic by NUTS: Regional labour market statistics. Population and social conditions: Labour market: Employment and unemployment

The Basque Country is an autonomous community located in northern Spain with 2,165,000 inhabitants in January 2015, which represent 4.7% of Spain's population.

Its potential workforce (population between the ages of 15 and 64) is 67%, as in the EU28 as a whole. However, it is declining quicker than in the EU28. Between 2008 and 2015 the Basque Country saw a decline of -6% while the whole of EU28 had a decline of -1%. Similarly, even though the total occupation represents 43% in both cases, in the same period the Basque Country has suffered a loss of 13%, which contrasts with the 1% loss of the EU28.

The Employment rate amongst the age group of 25 to 64 represents 67% in the autonomous community, while in the case of the EU28 they represent the 70%. The decline in the Basque

Country has been of a 7% between the years 2008 and 2015. Amongst the youngest the rate has declined a 49% and now represents 16.4%. In the EU28 they represent nearly the double. The same happens with the economic activity rates between the youngest, which declines a

31%. The employment rate of the population with low qualifications in the 25-64 age group is 35.2 in the Basque Country and 52.6 in the EU28.

In 2015 there were no significant differences in the distribution of self-employing population, part-time employment rate or full-time employment rate in the Basque Country and the EU28. If anything, the only thing worth mentioning concerning these rates is the growth of part-time employment rate in the Basque Country, with a rise of 37% between the years 2008 and 2015.

Concerning the sectorial distribution, the importance of the population employed in industry and services is slightly greater than in Europe, having in exchange less people working in agriculture. However, the recession in industry and agricultural employments has been notably greater in the case of the Basque Country.

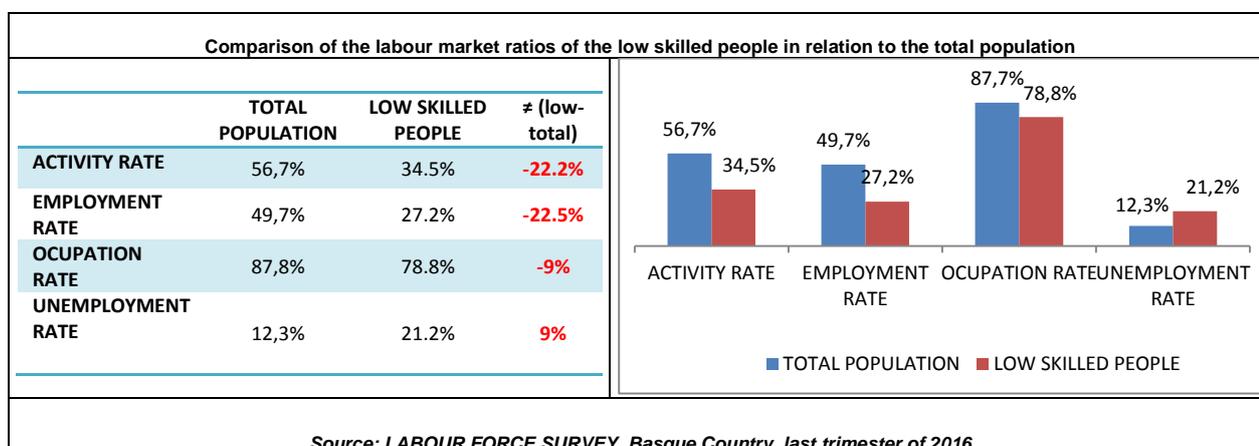
The unemployment rate has risen a 124% in the Basque Country; thus, getting a 14.8 unemployment rate in the autonomous community, while the EU28 has an unemployment rate of 9.4. Youth unemployment rate has doubled to now represent 40.4%. Long-term unemployment has almost multiplied by 4 reaching 9.4%, doubling the European mean in this rate.

Low skilled labour market characterization

Activity and occupation

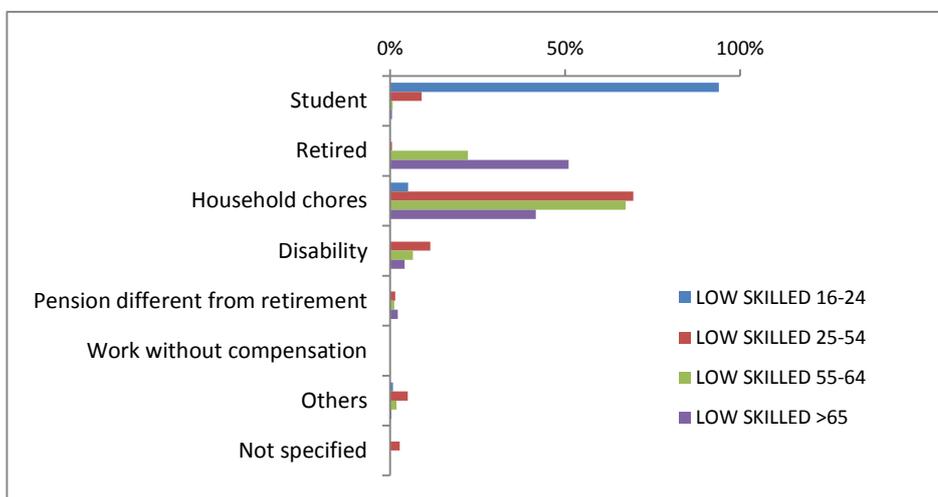
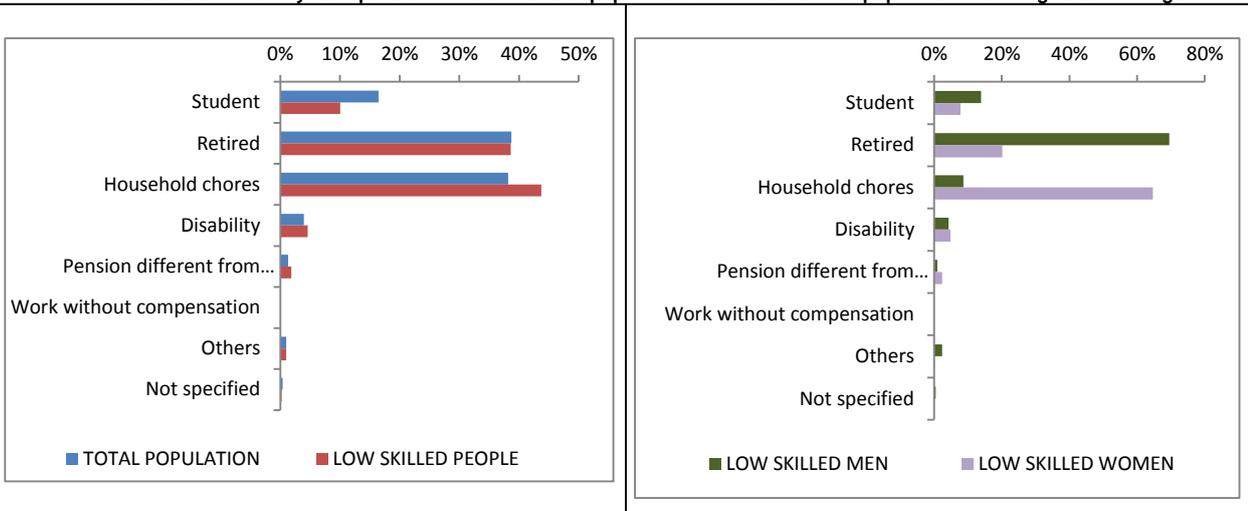
For this report, the population with low qualification has been defined as those older than 16 years old and with educational levels going from ISCED 0 to ISCED 2, which include preschool education (ISCED 0), primary education or first stage of basic education (ISCED 1) and first cycle of secondary education or second cycle of basic education (ISCED 2). The data used are those of 2016's last trimester.

The population with low qualifications in the Basque Country represents 41.6% of the population (755,022 people). Counting with a lower activity rate than the population as a whole, they also suffer from lower employment and occupation rates as well as higher unemployment rates.



The main reasons for the aforementioned inactivity of the less qualified people do not differ from those of the rest of the population. Like in the case of the main Basque population, household chores, retirements and studies are the primary causes. However, the disparities surface when low skilled people are filtered by sex and age group. For instance, retirement is the cause of inactivity for almost two thirds of the men, while for 65% of the women it is the household shores. Regarding age groups, young people are inactive, mainly, because of studies.

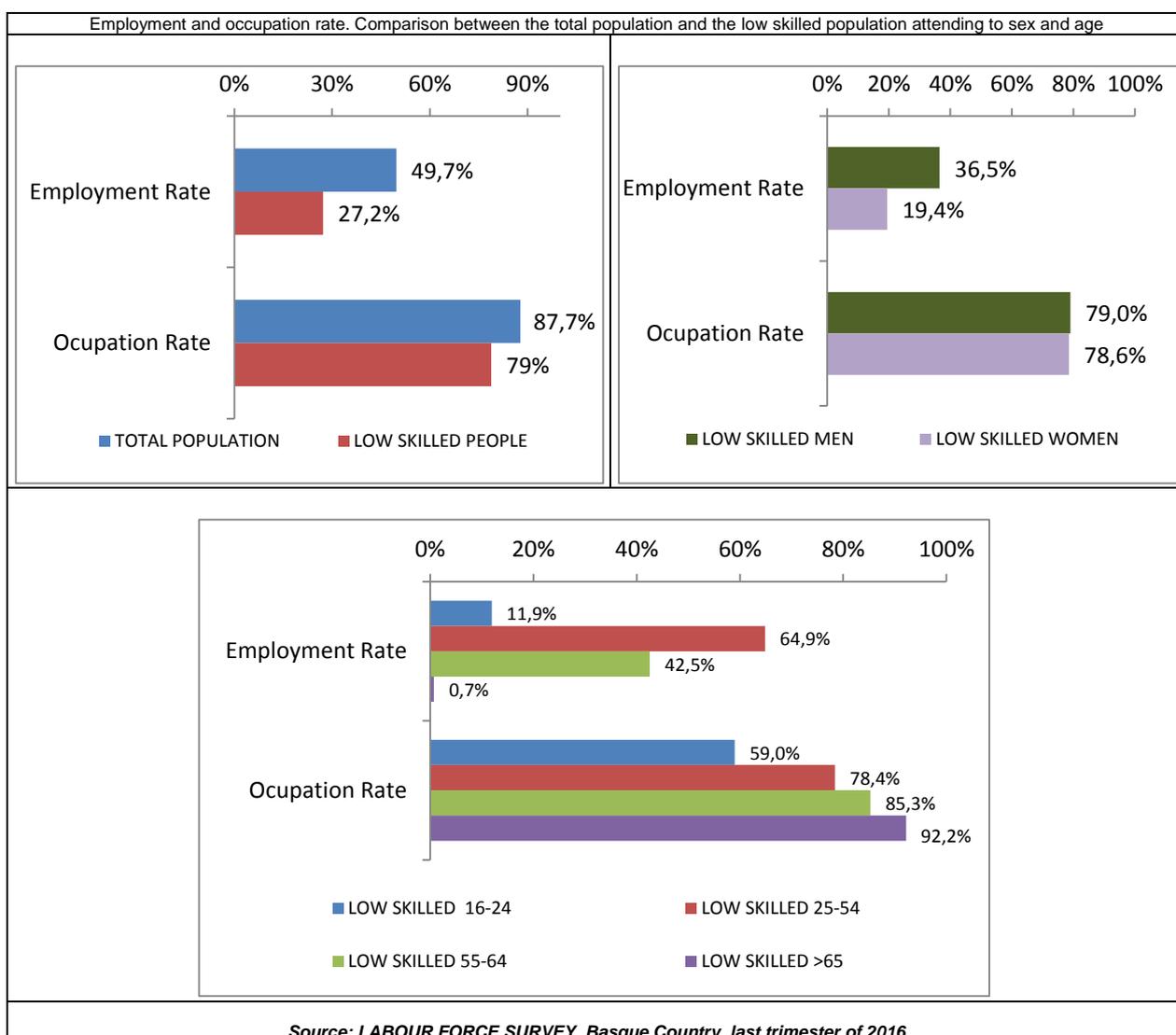
Main reasons for inactivity. Comparison between the total population and the low skilled population attending to sex and age



Source: LABOUR FORCE SURVEY. Basque Country, last trimester of 2016

Employment rate

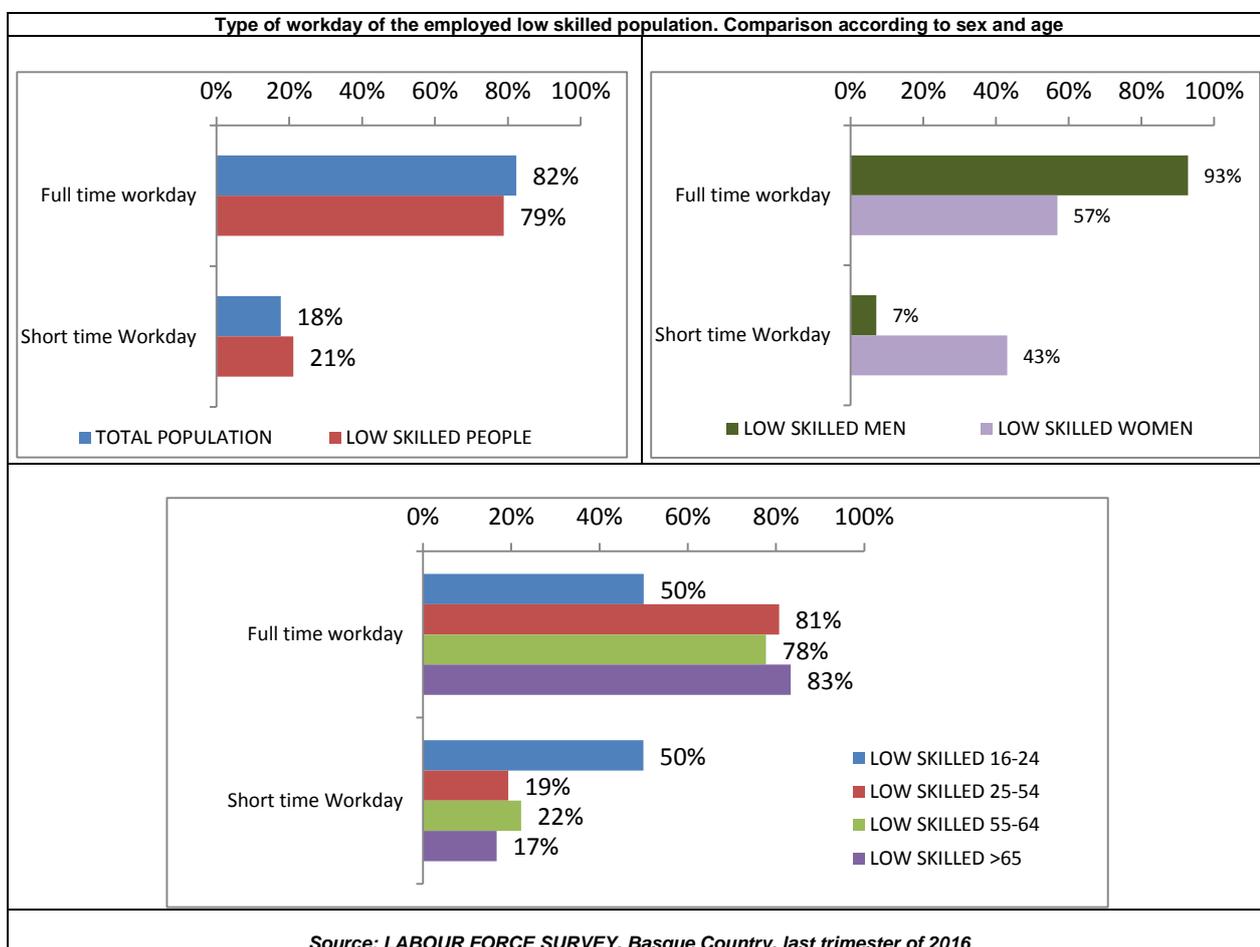
The employment rate is 22 points lower in the case of low skilled people than it is in the general public's case, 27.2% and 49.7% respectively. The same happens with the occupation rate where low skilled people have a slightly lower occupation rate than the entire population, 78.8% and 87.7% respectively. Regarding sex and age groups within the population with low skills, we can see that women's employment rate is significantly lower, while the occupation rate stays the same. In the case of age groups, it is the youngest who have a much lower employment rate. However, this does not happen only between low skilled youngsters, it is also a trend in the entire populations. On the other hand, it is only noteworthy that low skilled people between the ages of 55 and 65 have an employment rate of just 42.5%.



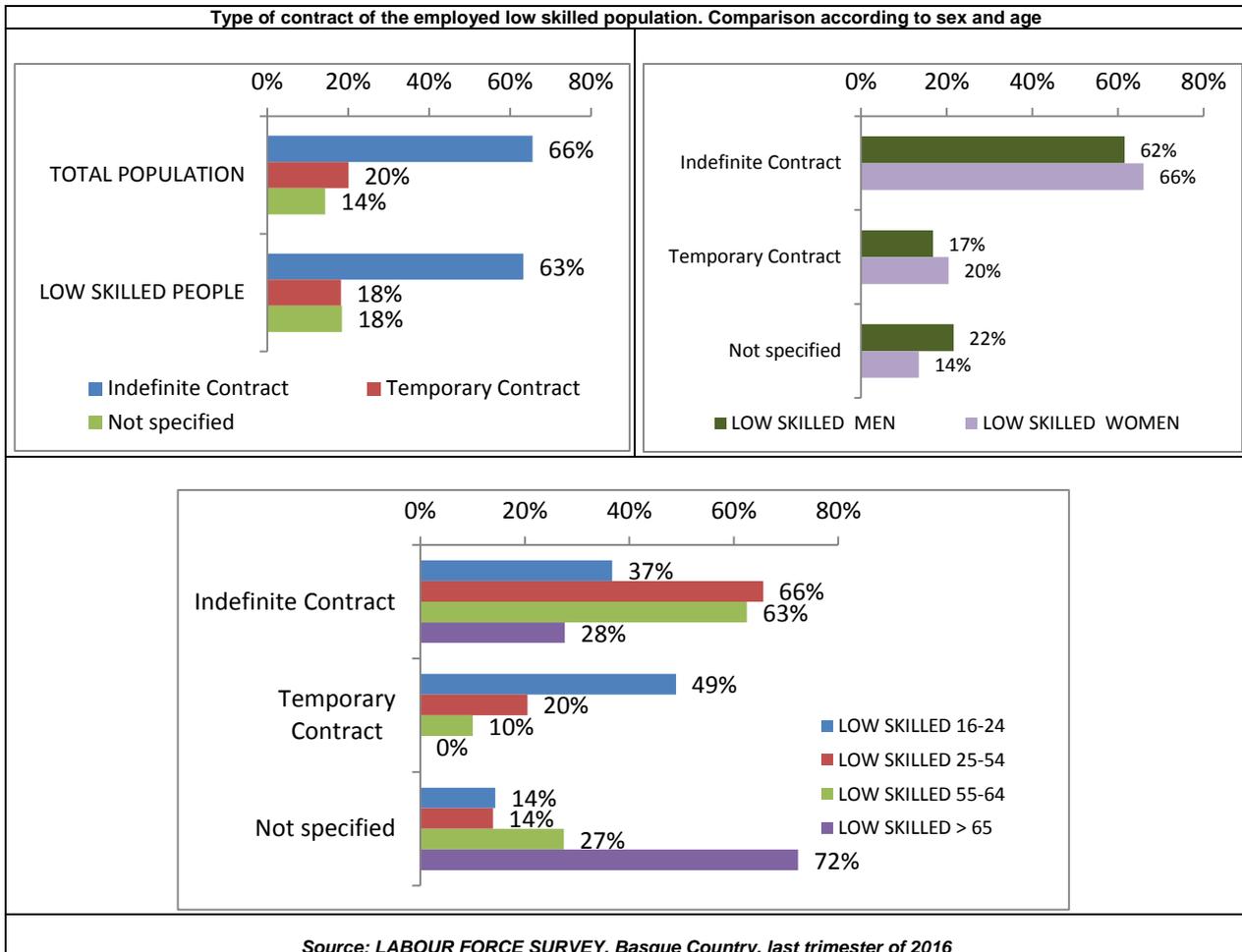
Labour conditions

Regarding labour conditions of low skilled people, we have analysed their workday (part-time or full-time) and the kind of contract they have (Indefinite or Temporary).

There is a slight difference in the weight part-time jobs have compared to the population as a whole, 21% and 18% respectively. However, once low skilled people are filtered by sex and age group the differences grow significantly. 43% of low skilled women have a part-time job, while only 7% of equally low skilled men are in that situation. When it comes to age groups, it is noteworthy that 50% of the youngest age group have a part-time job, which contrasts with the 19%, 22% and 17% of the following age groups (youngest to oldest).



When it comes to kinds of contracts, there are no differences of importance when compared with the main population. Indefinite contracts represent a 63% in the case of low skilled people and 66% in the entire population. There are no discrepancies of importance between both sexes. There is, however, an important distinction between the youngest age group and the rest age groups. In their case, temporary contracts represent nearly 50%, having only 37% of indefinite contracts.



1.2. Participation by sector and occupation

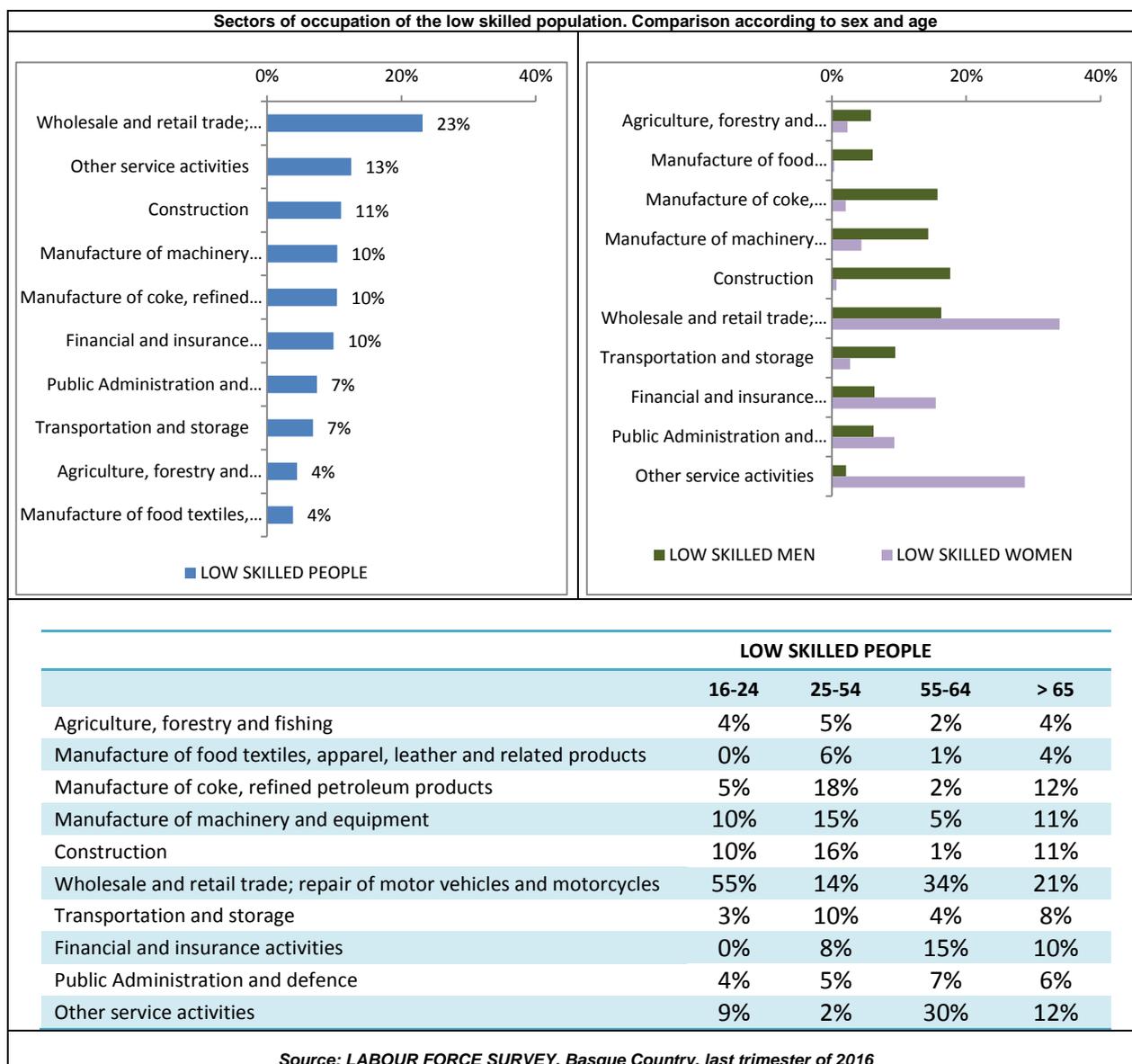
Activity sectors

With nearly one in four people working on it (23%), the main sector for low skilled people is *Wholesale and retail trade; repair of motor vehicles and motorcycles*. The remaining sectors hover between 7% and 13%. The sectors with the least representation of low skilled people are *Agriculture, forestry and fishing* and *Manufacture of food, textiles, apparel, leather, wood and paper*.

Regarding the differences between sexes among the low skilled, three out of four women work in the following sectors: *Wholesale, and retail trade; repair of motor vehicles and motorcycles*, *Financial and insurance activities* and *Other services*, with 34%, 15% and 29% respectively.

Concerning age groups, it is noteworthy the great importance of sectors like *Wholesale and retail trade; repair of motor vehicles and motorcycles*, *Construction* and *Manufacture of machinery and equipment n.e.c* have. These 3 sectors host the jobs of 55%, 10% and 10%,

respectively, of young low skilled people. In other age groups, although they are still of great significance, the added up percentage drops from 75% to 45%, 39 and 43%, from youngest to oldest, with other sectors gaining weight.

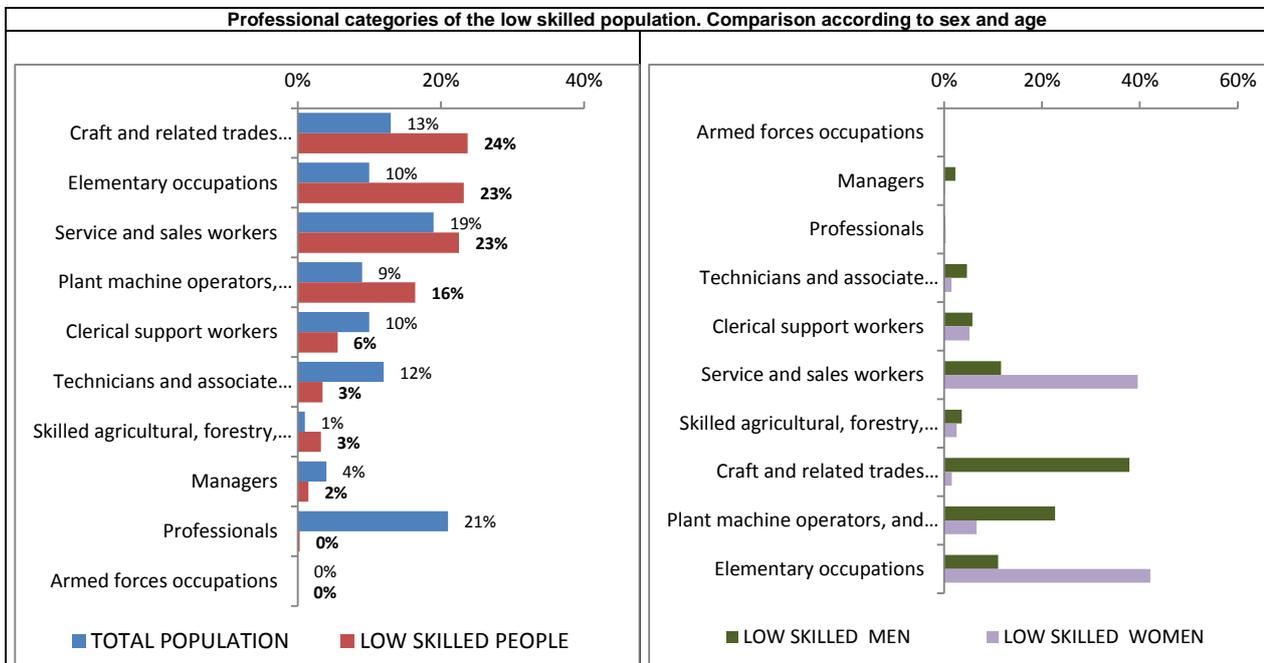


Professional categories

When it comes to occupations, 80% of low skilled people's jobs concentrate in just 4 occupational categories: *workers in restoration services, personal services, protection services and vendors, Artisans and skilled workers in manufacturing and construction* (with the exception of plant machine operators and assemblers), *Elementary occupations* and *Plant machine operators, and assemblers*. The divergence between low skilled people and the main occupied population are of great significance, especially in those occupational groups where skills of some sort are required, such as *Technicians and scientists and/or health and education intellectuals* where there is a difference of 20%.

There are some differences between both sexes within low skilled people too. While 82% of women work in the *workers in restoration services, personal services, protection services and vendors'* category, just 23% of men do. On the other hand, men have a larger representation in occupations such as, *Artisans and skilled workers in manufacturing and construction* (with the exception of plant machine operators and assemblers), *Elementary occupations* and *Plant machine operators, and assemblers*, which add up to men's 61% of jobs, while only representing 8% of women's.

In the case of age groups, a third of the youngest are *workers in restoration services, personal services, protection services and vendors; Craft and related trades workers* also stand out with 23% of young low skilled people. The next two age groups – 25 to 54 and 55 to 64 – have 46% and 44%, respectively, of their workers in these last two categories.



	LOW SKILLED PEOPLE			
	16-24	25-54	55-64	> 65
Armed forces occupations	0%	0%	0%	0%
Managers	0%	1%	3%	8%
Professionals	4%	0%	0%	0%
Technicians and associate professionals	9%	3%	4%	0%
Clerical support workers	0%	5%	7%	0%
Service and sales workers	36%	22%	22%	56%
Skilled agricultural, forestry, and fishery workers	0%	3%	4%	0%
Craft and related trades workers	23%	25%	22%	10%
Plant machine operators, and assemblers	3%	19%	14%	0%
Elementary occupations	25%	23%	24%	25%

Source: LABOUR FORCE SURVEY. Basque Country, last trimester of 2016

1.3. The evolution of the contracts of low skilled people

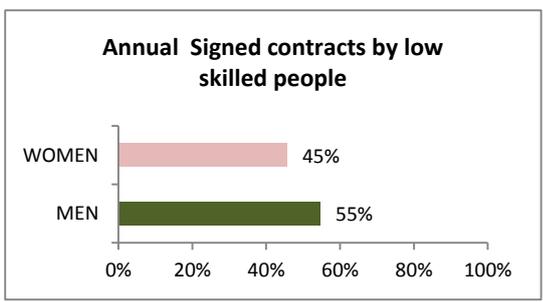
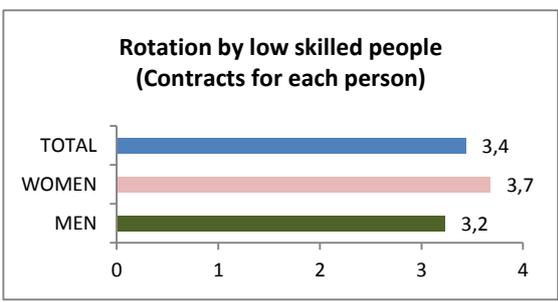
Evolution of new contracts

In 2016 a total of 926,599 contracts were signed in the Basque Country, showing a recovery of the economic crisis and its impact in recruiting. 44.5% of those contracts were signed by low skilled people. The trends show how in the last 10 years the number of new contracts has reached, and even slightly surpassed, those signed in 2007, just before the crash started. However, despite improving and getting nearer, among the low skilled it has not yet reached that benchmark.

Recruitment. Comparison of the evolution of contracts 2007-2016 between the total population and the low skilled population										
Annual signed contracts total and by low skilled people										
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Total	869.262	822.932	656.317	710.042	723.820	673.529	678.946	759.149	867.255	926.599
	100	95	76	82	83	77	78	87	100	107
Low skilled:	420.691	398.021	311.230	332.518	334.009	305.595	304.826	339.685	382.139	412.660
	100	95	74	79	79	73	72	81	91	98

Source: Contracts register (Labour Market Census) / 2007-2016

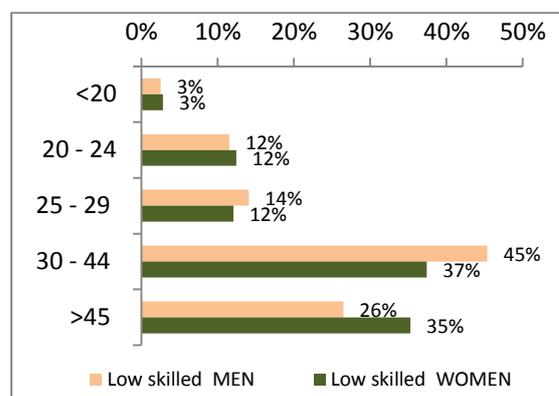
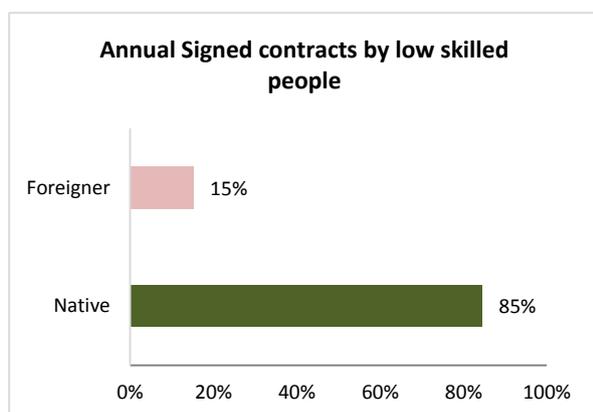
Only taking into account low skilled people, no difference of relevance is shown between the contracts signed by men and those signed by women – 55% and 45% respectively. However, women do have a greater rotation level than men – 3.7 and 3.2 respectively-. And here lies the difference with times previous to the crisis too. The mean rotation for both men and women has spiked from 2.7 to 3.4. In other words, on average back in 2007 each low skilled person had 2.7 contracts per year, while now they have 0.7 contracts more per year.

Distribution of the contracts of low skilled people by gender and evolution of the level of rotation of the contracts (contracts per person)										
 <p>Annual Signed contracts by low skilled people</p>					 <p>Rotation by low skilled people (Contracts for each person)</p>					
	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Rotation (Contracts for each person)	3,4	3,4	3,2	3,1	3,1	3,0	2,9	2,7	2,7	2,7

Source: Contracts register (Labour Market Census) / 2007-2016

Just 15% of new contracts have been signed by 24 year olds or younger low skilled people. Back in 2007, these people represented 44% of the total. Regarding nationality, it has not suffered many changes; in 2007 foreigners represented 17%, while now they represent 15% of new contracts.

Distribution of the contracts of low skilled people according to place of birth and age



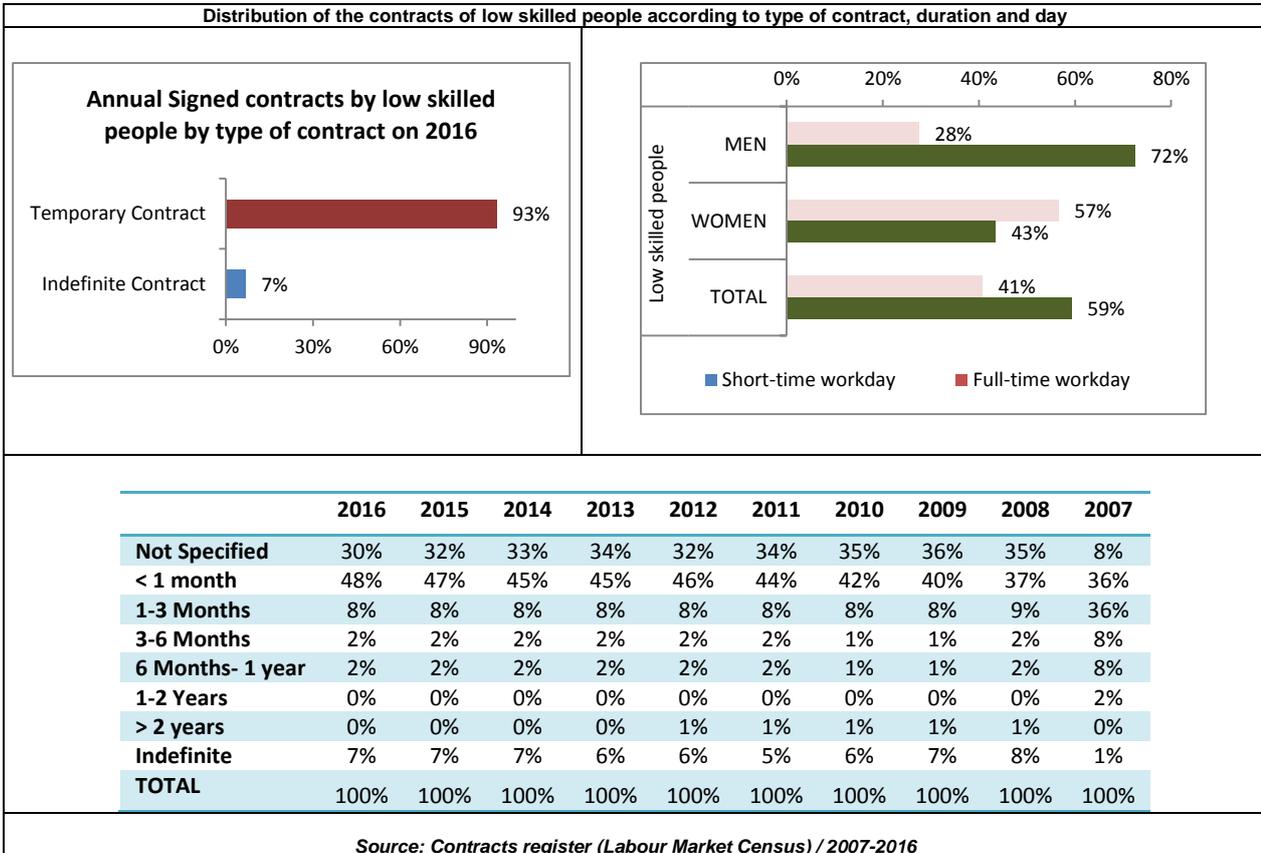
	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
<20	3%	2%	2%	2%	2%	3%	3%	4%	6%	7%
20 - 24	12%	11%	11%	12%	13%	15%	16%	16%	19%	37%
25 - 29	13%	14%	15%	16%	16%	16%	16%	15%	16%	37%
30 - 44	42%	43%	44%	45%	43%	42%	41%	41%	38%	15%
>45	30%	29%	28%	27%	26%	24%	24%	23%	21%	4%
Total	100%									

Source: Contracts register (Labour Market Census) / 2007-2016

Duration and conditions of contracts

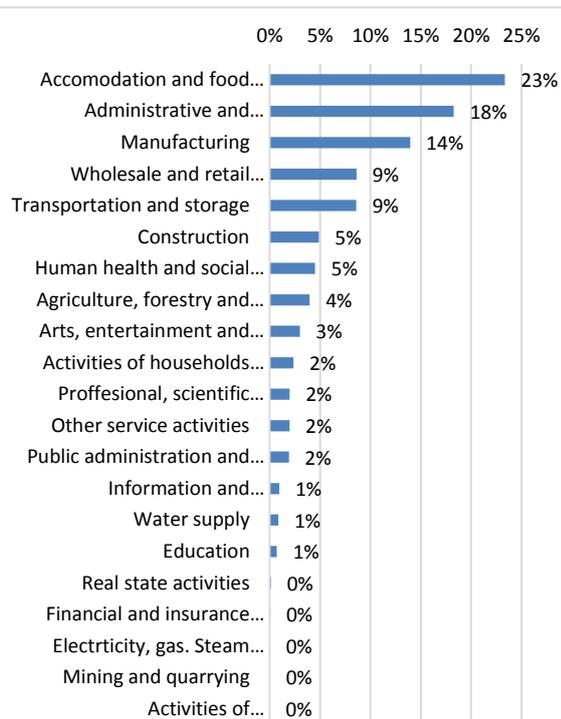
Concerning the kind of contracts signed by low skilled people, only 7% of them are indefinite. However, in 2007 this kind of contracts represented only 8%, so it cannot be said that there is much difference. Although no evolution has been seen in the type of contract, the workday has definitely evolved to a shorter part-time contract. These represented 30% in 2007 and now represent 41%. It is also noteworthy that almost half the contracts signed in 2016, 48%, have been for less than a month.

Distribution of the contracts of low skilled people according to type of contract, duration and day

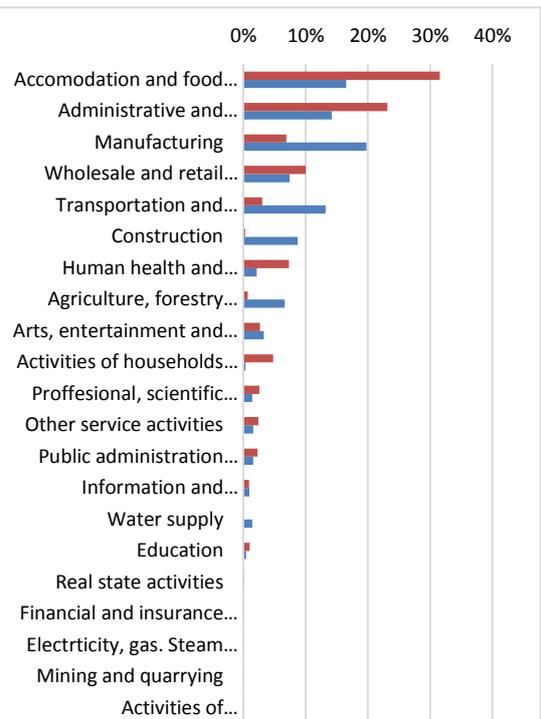


Contracts by activity sectors and professional categories:

Almost 75% of low skilled people's new contracts concentrate in just 5 activity branches: *Hostelry* (23%), *Clerical support workers* (18%), *Industry* (14%), *Sales and motored vehicles restoration services* (9%) and *Transportation and Storage* (9%). There are some differences between men and women, while there are less women in the *Industry* sector, there are more of them in *Hostelry*, *Clerical support workers* and *Health-related activities and social services*. Occupations such as *transport and distribution*, *construction and commerce* and *restoration of motored vehicles* have grown in the last ten years. On the other hand, *real state* has dropped from 40% to 0%. *Artistic, recreational and entertainment activities* have also suffered a decrease in the last 10 years.

Distribution of the contracts of low skilled people by branches of activity and sex


■ Annual Signed Contracts by low skilled people on 2016

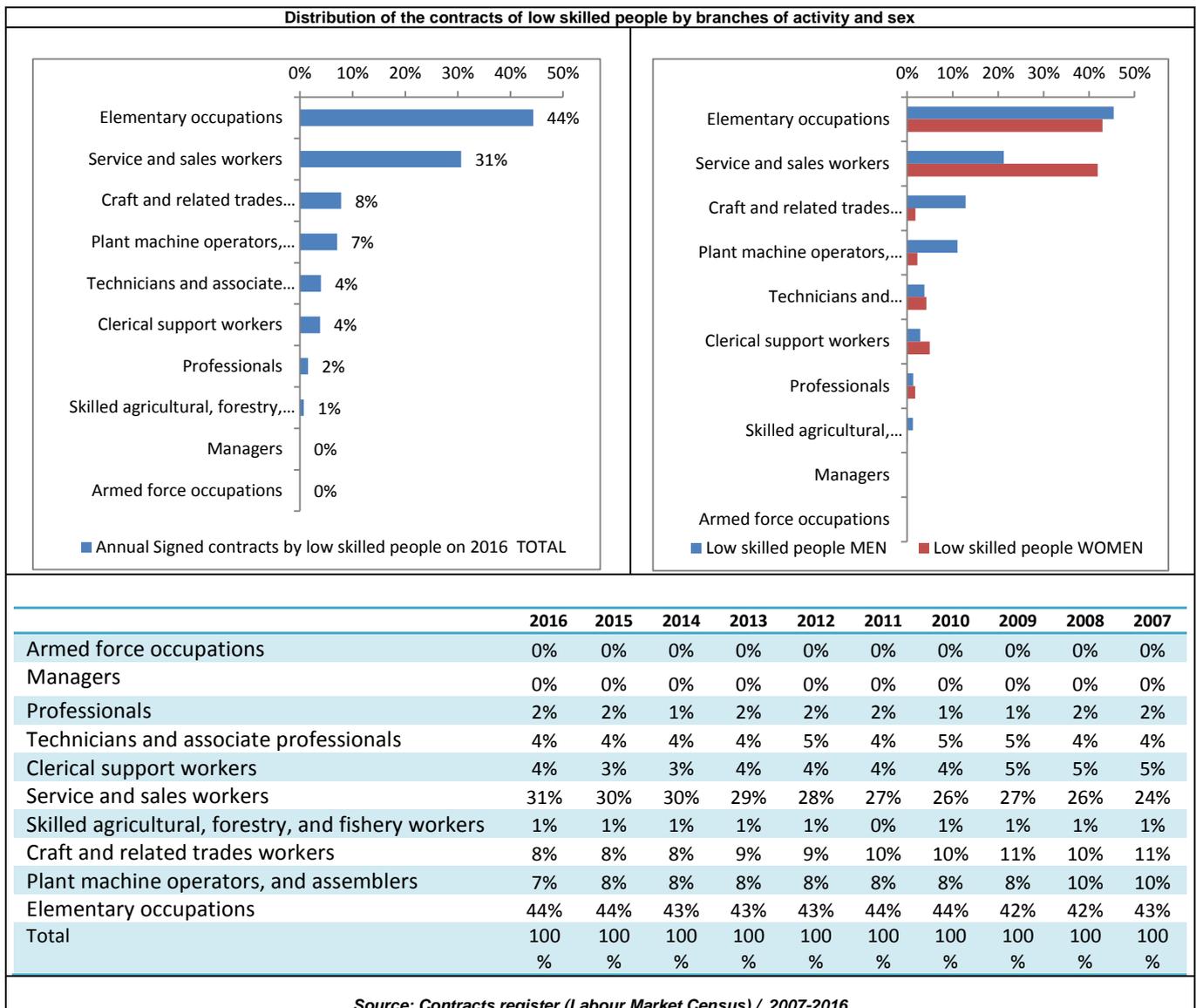


■ LOW SKILLED WOMEN ■ LOW SKILLED MEN

	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Agriculture, forestry and fishing	4%	4%	5%	4%	4%	3%	4%	3%	3%	2%
Mining and quarrying	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Manufacturing	14%	14%	13%	9%	9%	9%	9%	8%	11%	11%
Electricity, gas, steam and air supply	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Water supply	1%	1%	1%	1%	1%	1%	1%	1%	-	-
Construction	5%	5%	6%	7%	7%	8%	9%	10%	10%	11%
Wholesale and retail trade, repair of vehicles	9%	9%	9%	7%	8%	7%	7%	7%	7%	7%
Transportation and storage	9%	10%	9%	5%	4%	4%	4%	4%	4%	4%
Accommodation and food service activities	23%	21%	20%	17%	14%	13%	12%	12%	10%	9%
Information and communication	1%	1%	1%	1%	2%	2%	1%	2%	-	-
Financial and insurance activities	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Real estate activities	0%	0%	0%	0%	0%	0%	0%	0%	40%	40%
Professional, scientific and technical activities	2%	2%	2%	2%	2%	2%	1%	4%	-	-
Administrative and support service activities	18%	18%	19%	32%	36%	38%	37%	32%	-	-
Public administration and defence	2%	1%	1%	1%	1%	1%	2%	1%	1%	1%
Education	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%
Human health and social work activities	5%	5%	5%	5%	6%	6%	7%	7%	7%	6%
Arts, entertainment and recreation	3%	3%	3%	3%	3%	3%	3%	3%	-	-
Other service activities	2%	2%	2%	2%	2%	2%	2%	2%	6%	6%
Activities of households as employers	2%	2%	2%	3%	1%	0%	0%	0%	0%	0%
Activities of extraterritorial organization	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Contracts register (Labour Market Census) / . 2007-2016

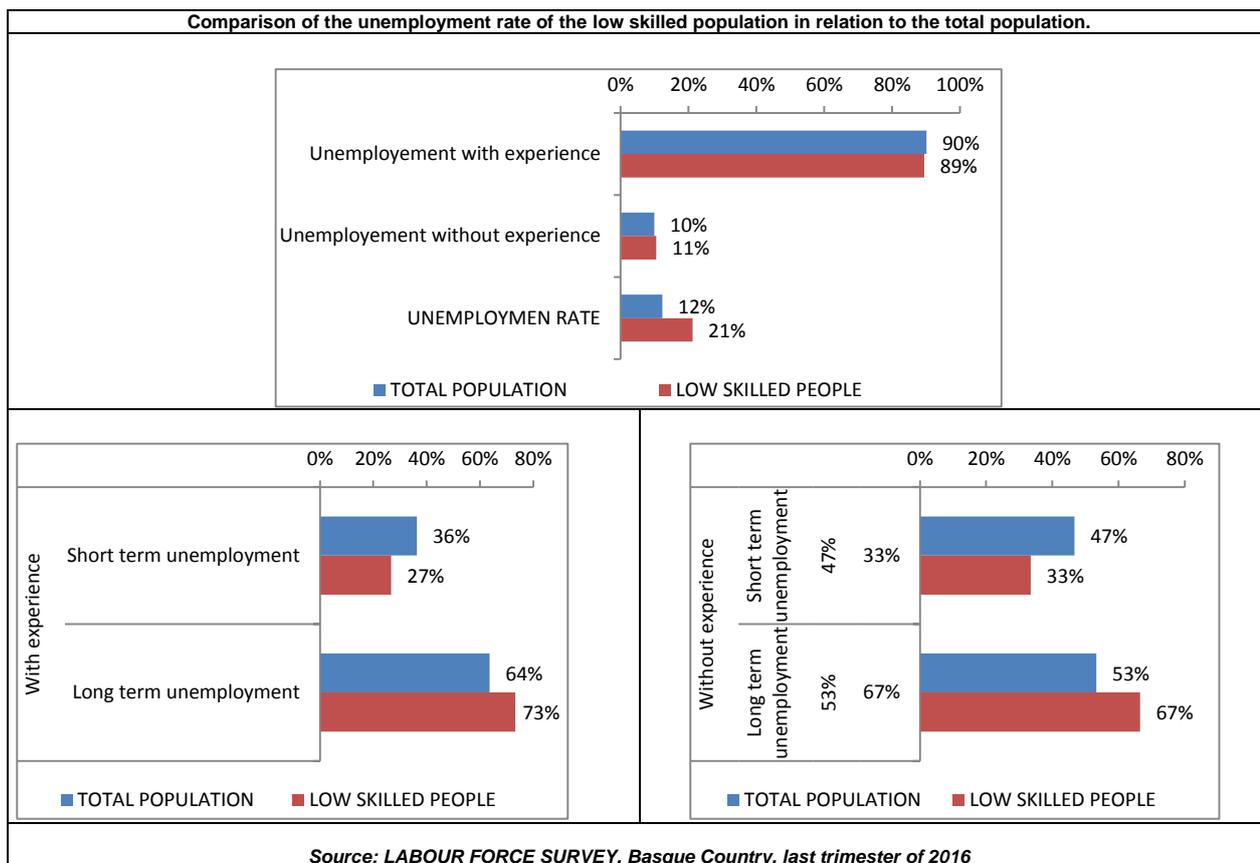
Regarding professional categories, 75% of the contracts signed by low skilled people have been in just two categories: 44% in the *Elementary occupation's* category and another 31% in the *Service and sales workers* category. However, 51% of contracts low skilled women have signed are in that last category. Concerning the evolution suffered in the last decade, two are the things which catch our attention: firstly, the gain in *Service and Sales workers*, and secondly, and perhaps most strikingly, the drop in number of workers contracted for *Clerical support workers*, *Craft and related trades workers* and *Plant machine operators, and assemblers*.



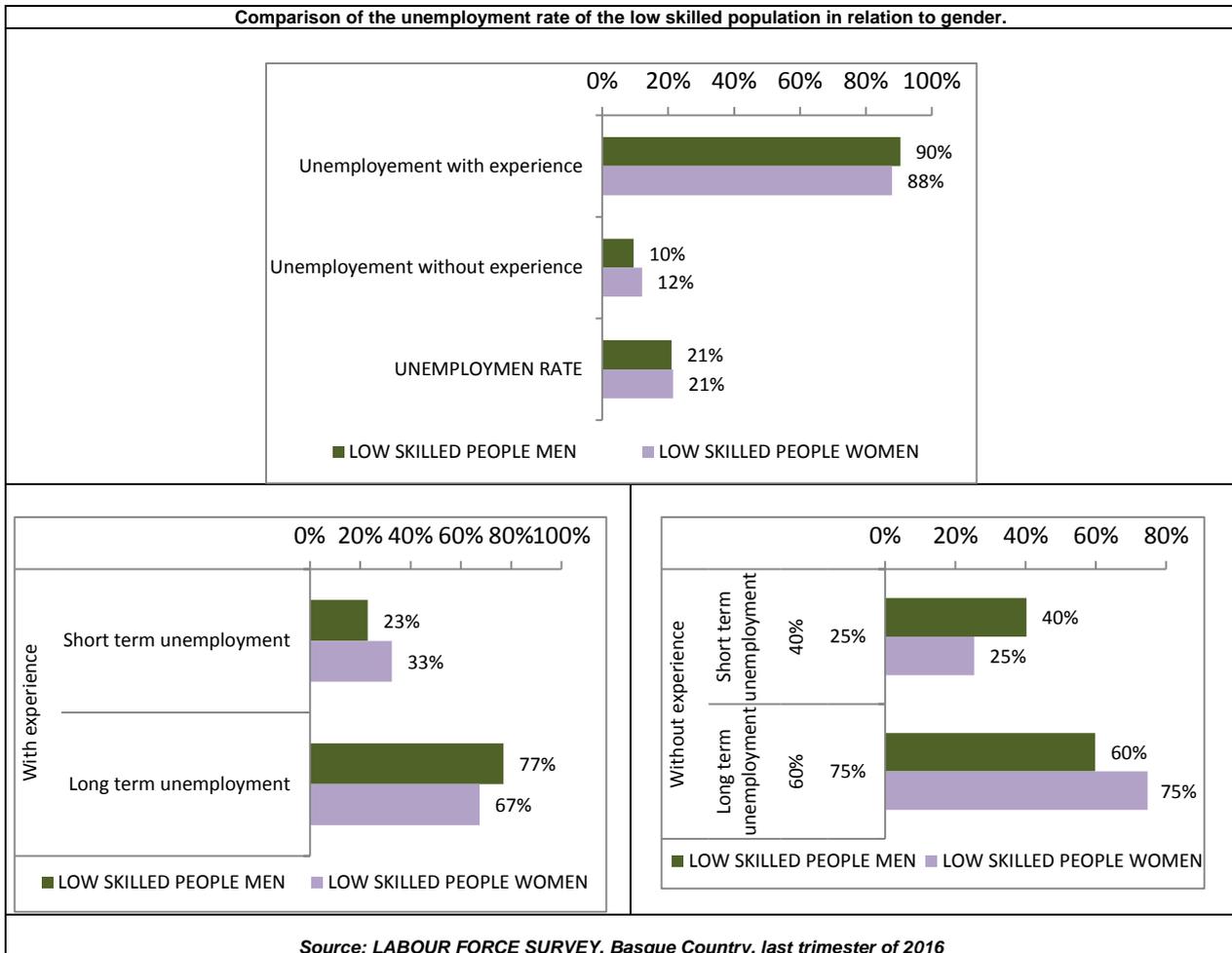
1.4. Unemployed low skilled people:

The unemployment rate among the low skilled is 9% higher than that of the Basque population as a whole, 21% and 12% respectively. Taking into account the total number of unemployed in the Basque Country, 126,189 people, unemployed low skilled people, 55,185 people, accounted for 43.7%, represent 43.7% of the total unemployment.

There is no difference regarding working experience between low skilled people and society as a whole. Nine in ten low skilled people have experience, just 11% off the total population.



Regarding sex, although the unemployment rate is the same for both cases, low skilled unemployed women have a greater percentage of inexperienced people.



The unemployment rate rises up to 35% in the case of low skilled young population, where, logically, half of them have no previous experience.

Comparativa de la tasa de desempleo de la población con baja cualificación en relación con el género.

		LOW SKILLED PEOPLE			
		16-24	25-54	55-64	> 65
With experience	Short term unemployment	27%	29%	20%	0%
	Long term unemployment	73%	71%	80%	100%
	Unemployment with experience	37%	93%	100%	100%
Without experience	Short term unemployment	51%	14%	0%	0%
	Long term unemployment	49%	86%	0%	0%
	Unemployment without experience	63%	7%	0%	0%
UNEMPLOYMENT RATE		41%	22%	17%	8%

Source: LABOUR FORCE SURVEY. Basque Country, last trimester of 2016

1.5. Statistical analysis conclusions

- Low skilled people in the Basque Country represent 41% of the total population. With a lower activity rate than that of total population (35% and 57%), they also show a lower employment rate (27% and 50%), lower occupation rate (79% and 88%) and a higher unemployment rate (1% and 12%)
- Part-time jobs are of a greater significance among the low skilled than among total population. However, the indefinite-temporary contract rate is quite similar among both groups.
- The main sectors in which low skilled people are contracted is commerce, with one in four jobs for the low skilled, and the main occupational groups are *workers in restoration services, personal services, protection services and vendors, Artisans and skilled workers in manufacturing and construction, Elementary occupations and Plant machine operators, and assemblers*
- Four in five contracts signed in 2016 have been contracts signed by low skilled people, with a rise in job rotation in the last decade. Only 6% of new contracts has been indefinite and the number part-time temporary contracts has risen since 2007 to represent nearly half of the contracts signed by low skilled people. Four in five contracts have been for activities related to hostelry, industry, clerical services, commerce and healthcare and social services.
- The unemployment rate is 5 points higher among low skilled people.
- Regarding differences between the two sexes among low skilled people:
 - The inactivity is higher among women, having a significantly lower employment rate.
 - Part-time jobs are more common among women.
 - Three in four jobs among women concentrate in *Wholesale and retailing, Public Administration and defence and Other services*. Men's jobs are closer to industrial activity.
 - Despite the number of contracts signed by both sexes being similar – 45% and 55% -, the rotation among women is higher. Higher representation of women in *hostelry, clerical services, healthcare services and social services*.
 - Same unemployment rate, but with a higher proportion of unemployed and inexperienced among low skilled women.
- Concerning differences among age groups:
 - The unemployment rate among the youngest is 20% higher than that of the total low skilled people.
 - Part-time temporary jobs are more common among the youngest low skilled people.
 - Nearly half of the youngest low skilled people are working in commerce, while for the rest age groups these sectors represent just one in four jobs. More than one third of those youngsters working in commerce are *workers in restoration services, personal services, protection services and vendors*, with few young low skilled people working in industry related sectors.

- Only 15% of the contracts signed in 2016 have been signed by low skilled people younger than 24 years old, while back in 2007 this percentage was 44%.
- The unemployment rate rises to more than one third in the case of low skilled people, where inexperienced unemployed people represent half of the youngest low skilled people.

SECTION 2. OPPORTUNITIES OF THE REPLACEMENT DEMAND FOR THE BASQUE COUNTRY

2.1. Projections for total employment by sector and occupations

The employment demands' projections in the Basque Country between 2015 and 2030, coming from both expansion and replacement needs, have been made by Lanbide, the Basque employment Service in 2017 following an econometric method developed by CEPREDE, Economic Prediction Centre. This model is capable of doing detailed medium- and long-term predictions of future employment demands in the Basque Autonomous Community taking into account 37 activity branches and 23 occupational categories.

According to their prediction, in this period the demand will grow in more than 100.000 jobs (107.454) compared to 2015's occupation data (902.105). This means an increase of 12% on the current volume of jobs.

Almost all of the growth is concentrated in the services' sector and, specifically, 80% of the activity branches: *Finance and Insurance services, Professional, Scientific and technical activities; Information and communications; Transport and storage and Health activities and social services.* Growth is also to be expected in the following activities: *Administrative activities and auxiliary services; Other Services; Wholesale and retail; repair of motor vehicles and motorbikes ; Hostelry; Household activities as employees of domestic personnel activities of households as producers of goods and services for own use; Education; Public administration and defence; compulsory Social Security; and Construction* with lower proportion. However, the following activities will lose labour force: *Extractive industries; Electric energy, gas, steam and air conditioning supply* and specially *Manufacture* and the first sector *Agriculture, animal breeding, forestry and fishing.*

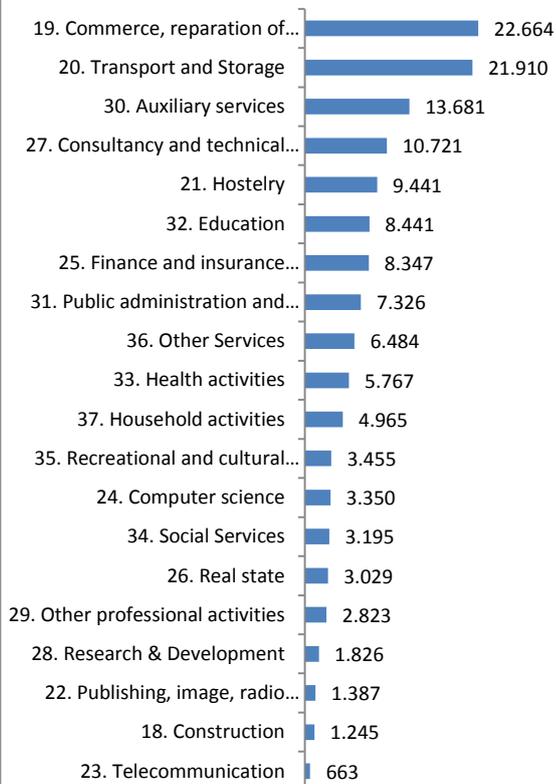
The economic activities with the biggest expected employment growth are the following: *Commerce; reparation of vehicles; Transport and Storage; Consultancy and technical activities; Auxiliary service ; Hostelry; Education; Financial and Insurance activities; Public administration and defence; other services; Health activities and social services; Household activities; Recreational and cultural activities; computer science; Social Services; Real State; Other professional activities; Research and development; Publishing, image, radio and TV; Construction and Telecommunications.* The following table and graphs show a more detailed analysis of the projections by sectors and activity branches.

Employment demand in Euskadi 2015-2030, regarding main economic sectors and activity branches.	2015	2030	VARIACIÓN 2015-2030
A.- AGRICULTURE, ANIMAL BREEDING, FORESTRY AND FISHING	13.460	8.099	-5.361
1. Agriculture, animal breeding and fishing	13.460	8.099	-5.361
B.- EXTRACTIVE INDUSTRIES	406	382	-24
2. Extractive industries	406	382	-24
C.- MANUFACTURE	183.397	155.924	-27.473
3. Food, drink and tobacco industries	14.115	13.140	-975
4. Textile, clothing, leather and footwear	2.393	1.402	-991
5. Wood, paper and graphic arts	11.697	10.767	-930
6. Petroleum refinement	968	352	-616
7. Chemical Industry/ 8. Pharmaceutical products	4.604	4.446	-158
9. Rubber, plastic and other non-metal products	17.973	14.692	-3.281
10. Metallurgy and other Metal products	68.044	50.364	-17.680
11. Computer and electronic products	5.098	4.748	-350
12. Material and electronic equipment	8.369	7.794	-575
13. Machinery and electric equipment	21.083	20.612	-471
14. Transporting material	15.781	15.152	-629
15. Furniture and other manufacturing	13.272	12.455	-817
D.- ELECTRIC ENERGY, GAS, STEAM AND AIR CONDITIONING SUPPLY	7.328	6.920	-408
16. Electric energy	2.012	1.898	-114
17. Water and sanitation supply	5.316	5.022	-294
F.- CONSTRUCTION	54.538	55.783	1.245
18. Construction	54.538	55.783	1.245
G.- WHOLESALE AND RETAIL; REPAIRATION OF MOTORED VEHICLES AND MOTORBIKES	123.595	146.259	22.664
19. Commerce, repairation of vehicles	123.595	146.259	22.664
H.- TRANSPORT AND STORAGE	39.476	61.386	21.910
20. Transport and Storage	39.476	61.386	21.910
I.- HOSTELRY	54.215	63.656	9.441
21. Hostelry	54.215	63.656	9.441
J.- INFORMATION AND COMMUNICATION	20.301	25.701	5.400
22. Publishing, image, radio and TV	5.198	6.585	1.387
23. Telecommunication	2.494	3.157	663
24. Computer science	12.609	15.959	3.350
K.- FINANCE AND INSURANCE ACTIVITIES	24.115	35.491	11.376
25. Finance and insurance activities	18.032	26.379	8.347
26. Real state	6.083	9.112	3.029
M.- PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	57.847	73.217	15.370
27. Consultancy and technical activities	40.351	51.072	10.721
28. Research & Development	6.882	8.708	1.826
29. Other professional activities	10.614	13.437	2.823
N.- ADMINISTRATIVE ACTIVITIES AND AUXILIARY SERVICES	51.508	65.189	13.681
30. Auxiliary services	51.508	65.189	13.681
O.- PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	56.802	64.128	7.326
31. Public administration and defence	56.802	64.128	7.326
P.- EDUCATION	65.438	73.879	8.441
32. Education	65.438	73.879	8.441
Q.- HEALTH ACTIVITIES AND SOCIAL SERVICES	82.498	94.915	12.417
33. Health activities	44.723	50.490	5.767
34. Social Services	24.772	27.967	3.195
35. Recreational and cultural activities	13.003	16.458	3.455
S.- OTHER SERVICES	24.398	30.882	6.484
36. Other Services	24.398	30.882	6.484
T.- HOUSEHOLD ACTIVITIES AS EMPLOYEES OF DOMESTIC PERSONNEL; ACTIVITIES OF HOUSEHOLDS AS PRODUCERS OF GOODS AND SERVICES FOR OWN USE	28.845	33.810	4.965
37. Household activities	28.845	33.810	4.965
U.- ORGANISATIONS' AND EXTRATERRITORIAL ORGANISMS' ACTIVITIES	0	0	0
38. Extraterritorial organisms	0	0	0

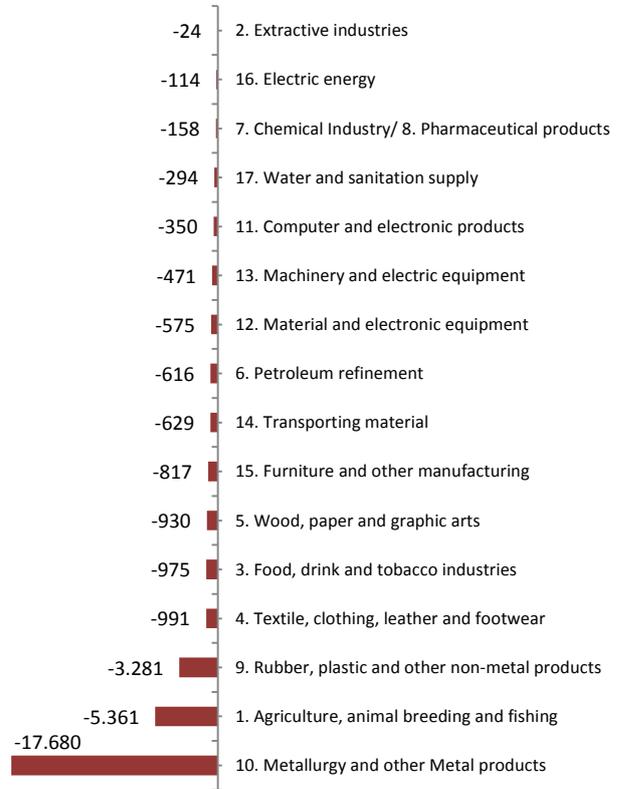
Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

Estimated variation of employment demand in Euskadi 2015-2030 by activity branches

ESTIMATED GROWTH OF EMPLOYMENT DEMAND IN EUSKADI 2015-2030 BY ACTIVITY BRANCHES



ESTIMATED LOSS OF EMPLOYMENT DEMAND IN EUSKADI 2015-2030 BY ACTIVITY BRANCHES



Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

On the other hand, the employment demand in these sectors will vary depending on the occupational profiles. The occupations which will see an increase in the demand in the 2015-2030 period will be the following: *Catering, personal and protection service workers and salespeople; Technicians; Supporting personnel; Science technicians and professionals and education and health intellectuals and Installation and machinery operators*. However, the following will suffer a decrease: *accountants, administrative workers and other clerical workers; Artisans and qualified workers in manufacture and construction (except installation and machinery operators); Managers and directors and elemental occupations*.

The professional profiles increasing the most will be *Shop assistants and similar; Executives, scientists and intellectuals; Technicians in engineering, IT, electronics, quality and other technical specificities; Protection and security workers; Assisting technicians in financial, commercial and management operations; Drivers and moving machinery operators; clerical workers attending the public; Catering and personal service workers; Intermediate managers, workshop and team bosses; Industrial installation and fixed machinery operators and assemblers; Primary teachers or professionals; Clerical workers not attending the public; Doctors and Qualified construction workers*.

2.2. Trends in replacement demand

If the expansion needs in the Basque Country will mean an increase in employment of 100.000 odd people, the projections show that the replacement demands will be even greater; they will nearly double the expansion demands, meaning almost 370.000 employments more.

17% of these replacements will be in the manufacture industry, where more than 63,000 people should be replaced by 2030. The activity sectors with the greatest replacement opportunities are the following: *Manufacture; Wholesale and retail repair of motorised vehicles and motorbikes; Health activities and social services; Public administration and defence; Education; Administrative activities and auxiliary services; Professional, scientific and technical activities; Construction; Transport and storage; hostelry and Household activities as employees of domestic personnel; activities of households as producers of goods and services for own use.*

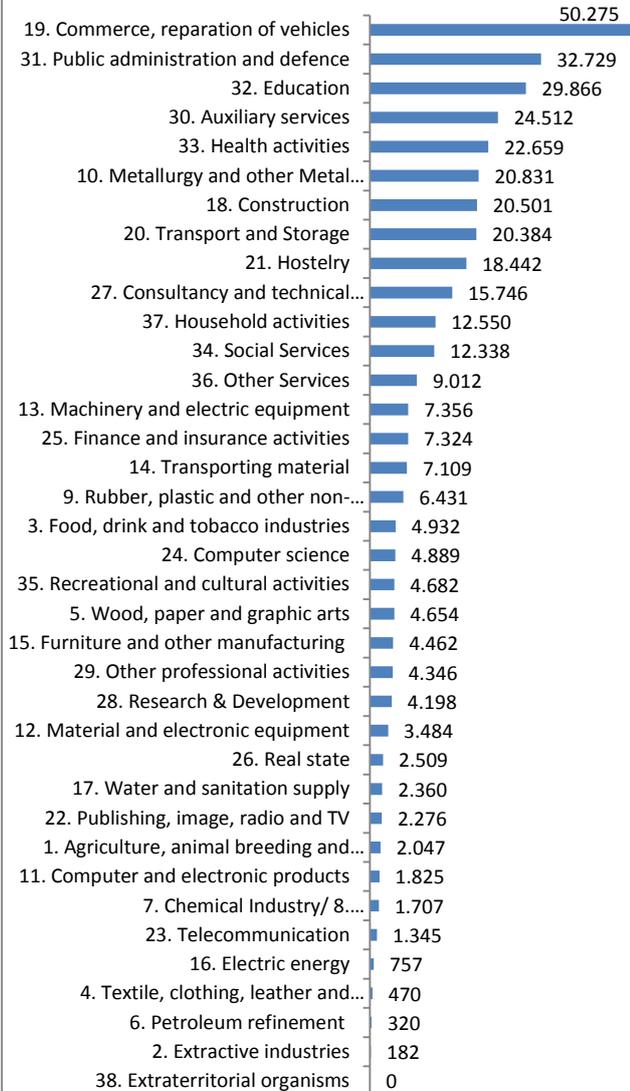
Regarding activity branches, the main replacement opportunities will come in *Commerce, repair of vehicles; Public administration and defence; Education; Auxiliary services; Health activities; Metallurgy and metallic products; Construction; Transport and storage; Hostelry; Consultancies and technical activities; Household activities and Social Services.*

Replacement demand in Euskadi 2015-2030, regarding main economic sectors and activity branches.	REPLACEMENT DEMAND 2015-2030
A.- AGRICULTURE, ANIMAL BREEDING, FORESTRY AND FISHING	2.047
1. Agriculture, animal breeding and fishing	2.047
B.- EXTRACTIVE INDUSTRIES	182
2. Extractive industries	182
C.- MANUFACTURE	63.581
3. Food, drink and tobacco industries	4.932
4. Textile, clothing, leather and footwear	470
5. Wood, paper and graphic arts	4.654
6. Petroleum refinement	320
7. Chemical Industry/ 8. Pharmaceutical products	1.707
9. Rubber, plastic and other non-metal products	6.431
10. Metallurgy and other Metal products	20.831
11. Computer and electronic products	1.825
12. Material and electronic equipment	3.484
13. Machinery and electric equipment	7.356
14. Transporting material	7.109
15. Furniture and other manufacturing	4.462
D.- ELECTRIC ENERGY, GAS, STEAM AND AIR CONDITIONING SUPPLY	3.117
16. Electric energy	757
17. Water and sanitation supply	2.360
F.- CONSTRUCTION	20.501
18. Construction	20.501
G.- WHOLESALE AND RETAIL; REPAIRATION OF MOTORED VEHICLES AND MOTORBIKES	50.275
19. Commerce, repairation of vehicles	50.275
H.- TRANSPORT AND STORAGE	20.384
20. Transport and Storage	20.384
I.- HOSTELRY	18.442
21. Hostelry	18.442
J.- INFORMATION AND COMMUNICATION	8.510
22. Publishing, image, radio and TV	2.276
23. Telecommunication	1.345
24. Computer science	4.889
K.- FINANCE AND INSURANCE ACTIVITIES	9.833
25. Finance and insurance activities	7.324
26. Real state	2.509
M.- PROFESSIONAL, SCIENTIFIC AND TECHNICAL ACTIVITIES	24.290
27. Consultancy and technical activities	15.746
28. Research & Development	4.198
29. Other professional activities	4.346
N.- ADMINISTRATIVE ACTIVITIES AND AUXILIARY SERVICES	24.512
30. Auxiliary services	24.512
O.- PUBLIC ADMINISTRATION AND DEFENCE; COMPULSORY SOCIAL SECURITY	32.729
31. Public administration and defence	32.729
P.- EDUCATION	29.866
32. Education	29.866
Q.- HEALTH ACTIVITIES AND SOCIAL SERVICES	39.679
33. Health activities	22.659
34. Social Services	12.338
35. Recreational and cultural activities	4.682
S.- OTHER SERVICES	9.012
36. Other Services	9.012
T.- HOUSEHOLD ACTIVITIES AS EMPLOYEES OF DOMESTIC PERSONNEL; ACTIVITIES OF HOUSEHOLDS AS PRODUCERS OF GOODS AND SERVICES FOR OWN USE	12.550
37. Household activities	12.550
U.- ORGANISATIONS' AND EXTRATERRITORIAL ORGANISMS' ACTIVITIES	0
38. Extraterritorial organisms	0

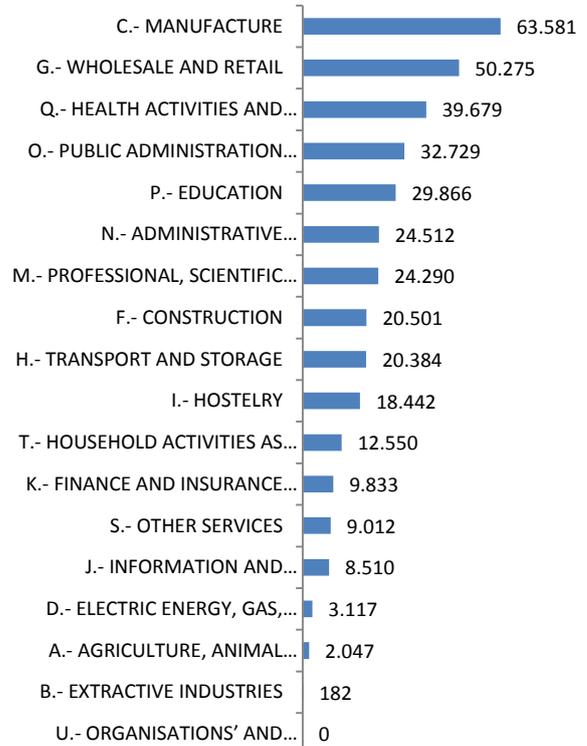
Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

Replacement demand in Euskadi 2015-2030, regarding main economic sectors and activity branches.

REPLACEMENT DEMAND IN EUSKADI 2015-2030, REGARDING ACTIVITY BRANCHES.



REPLACEMENT DEMAND IN EUSKADI 2015-2030, REGARDING MAIN ECONOMIC SECTORS



Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

SECTION 3. SELECTED ECONOMIC SECTOR AND TARGET GROUP IN THE BASQUE COUNTRY

3.1. Social care sector

In the case of the Basque Country we have selected the “Social Care” sector, mainly, for three reasons:

- 1) the significance the sector has and its positive evolution the last few years;
- 2) the positive projections for the coming years, due to both expansion demand (because of the aging Basque population and the foreseeable increment of chronic diseases) and replacement needs;
- 3) the suitability of the sector to low skilled people, since it already hosts an important number of posts related to this group of people (elementary occupations) and continues to be one of the most important sectors in the inclusion to the labour market for them.

The occupations and activities are divided, mainly, in two activity branches and two occupation branches. As activities go, the main group of personal caring, which would be *Social service activities* (Social service supply activities with accommodation and Social service supply without accommodation) but we have decided to also include the activities of *Homes which employ domestic staff*, since many personal caring services are offered not by formed personnel, but by usual domestic services. Regarding professional categories, most workers are part of the *Elementary occupations (unqualified service workers and fishing, construction, industry and transport labourer)* and, among those more skilled *Catering, personal, protection and sales workers and Catering and personal service workers*.

As for the evolution this sector has suffered, both the number of companies offering caring at home and the employments the sector hosts has notably increased in the last few years, despite the economic crisis.

Evolution of employment in the Social Care sector in Euskadi	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Social Service activities	19400	20670	21477	22635	23597	23200	23790	23228	23232	23500	24448	24772
Household activities such as domestic personnel	18010	24656	31981	39073	46734	42366	37314	31485	25034	25628	26511	28845

Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

Evolution of the number of companies in the Social Care sector in the Basque Country	2008	2009	2010	2011	2012	2013	2014	2015	2016
8710 Assistance in residences with health-related caring	87	77	84	93	90	80	75	73	73
8720 Assistance in residences targeted to people with intellectual disability, mental illness and drug addiction	74	60	68	69	68	70	67	67	70
8731 Assistance in residences targeted to senior citizens	351	356	360	353	340	344	336	336	333
8732 Assistance in residences targeted to people with physical disabilities.	26	21	21	22	22	21	22	21	22
8790 Other activities of residential caring	110	106	109	112	105	112	100	102	96
8811 Social service targeted to senior citizens	126	138	138	156	145	135	145	154	155
8812 Social service targeted to disabled people	133	138	144	165	166	164	162	188	183
8891 Day-time kid caring	100	106	96	91	87	99	98	101	93
8899 Other social service activities without accommodation	513	472	478	485	455	447	448	463	495

Source: Eustat. Directorio de actividades económicas y demografía empresarial. 2014

Regarding the foreseen evolution, the growth estimations are very positive. The socio-health needs are growing due to sociodemographic evolutions (aging population, increase of chronic illness), great sociocultural changes (changes in families' structures and organisation, changes in the social organisation of caring...) and to important social and normative improvements (e.g. the destigmatisation and recognition of the right of disabled people).

In the last three decades, the average age of Basque citizens has increased from 33.78 to 44.07 years old. This regression is caused by the drop the birth rate has suffered and will mean an even steeper aging of the population. Currently in the Basque Country there are more people over 65 years old (19.54%) than under 17 years old (16,11%). This situation will be even worse when the baby boomers hit the 65 year old mark in the year 2020. Eustat has made estimated that by 2026 more than a quarter the population, 26.5%, will be over 65 years old.

Regarding the personal cares this aged population will need, according the latest assessments more than a quarter of over 65 year olds (and 60% of people of over 80s) are dependent on a certain way in their daily lives: 5% need help when going to the toilet, a 15% when having a bath or a shower and a 3% when eating. Within the 28% of the population expected to need help, 69.3% are women, due to the great unbalance there is between both sexes among those ages. Moreover, the personal care assistance needs are greater as people get older.

In the projections of employment needs due to expansion and replacements, this expected evolution is apparent, since circa 15,500 jobs are expected to be created in Social service activities both due to expansion and replacement of people currently working in it.

Estimate of the replacement needs in the Basque Country by branches of activity in the period 2015-2030	Employment 2015	Employment estimate in 2030	New job posts	Replacement needs
Q.- HEALTH AND SOCIAL SERVICE ACTIVITIES	82.498	94.915	12.417	39.679
34. Social service activities	24.772	27.967	3.195	12.338
T.- HOUSEHOLD ACTIVITIES AS EMPLOYEES OF DOMESTIC PERSONNEL; ACTIVITIES OF HOUSEHOLDS AS PRODUCERS OF GOODS AND SERVICES FOR OWN USE	28.845	33.810	4.965	12.550
37. Household activities	28.845	33.810	4.965	12.550

Source: LANBIDE- FUTURELAN (observatorio de prospectiva del empleo y tendencias ocupacionales en Euskadi). 2015-2030

Finally, we consider it to be a very suitable sector for the target group the project has. This sector has shown a better than average insertion rate once the target group has gone through vocational training, improving their skills. The target population also showed a better suitability after going through training than the average. It is one of the main sectors for low skilled people, specially for women.

The data, provided by Lanbide – the Basque Employment Service – who is also responsible of providing vocational training (occupational and continuous training), ratify the good results of the at home social and health care occupational training. Throughout 2015 15 of these were carried out, in which 1,999 people were accredited. The insertion rate has been as high as 58.8% after the first six months after the training, which translates in 117 people, with 90.6% of them, 106 people, working now in this branch and 53.8% of them working precisely in this activity (specifically at home social and health care related activities). Half the trainees are part of our studies' target, since 102 of them had a maximum of ISCED2 level study. This 50% repeats itself when checking those who found a job in less than 6 months after the training (55 out of 117).

The main occupations within these activity branches are *Elementary occupations (Unqualified service, agriculture, fishing, industry and transport workers)* and, with a higher qualification, there is the group of *Hostelry, personal, protection and sales service workers* and *Hostelry and personal service workers*.

In the *Social service related activities* 48% of the occupation corresponds to *Hostelry and personal service workers* and a 10% with *Elementary Occupations (unqualified workers)*. In the case of *Household activity as domestic staff*, 90% of the occupation is centred in *Elementary occupations* and 9% in *Hostelry and personal service workers*.

	Employment in the Social Services' activities				Employment in Household activities such as Domestic Staff			
	2015	%	2030	%	2015	%	2030	%
DIRECTORS AND MANAGERS	1.093	4%	887	3%	0	0%	0	0%
CEOs and section directors in companies with more than 10 workers	597	2%	290	1%	0	0%	0	0%
Managers in companies with more than 10 workers	496	2%	597	2%	0	0%	0	0%
HEALTH AND TEACHING TECHNICIANS, SCIENTISTS AND INTELLECTUALS	2.797	11%	2.551	9%	25	0%	14	0%
Higher cadres, scientific professionals and intellectuals	407	2%	259	1%	0	0%	0	0%
Primary and / or professional teachers	532	2%	280	1%	0	0%	0	0%
Secondary and / or higher teachers	350	1%	422	2%	0	0%	0	0%
Doctors	266	1%	117	0%	13	0%	7	0%
Nurses	1242	5%	1473	5%	12	0%	7	0%
TECHNICIANS; SUPPORTING PROFESSIONALS	5.477	22%	10.494	38%	244	1%	261	1%
Technicians in engineering, computer science, electronics and quality and other techniques	3573	14%	8203	29%	0	0%	0	0%
Technicians and support professionals in oper. Financial, commercial and managerial	543	2%	654	2%	173	1%	201	1%
Intermediate controls, workshop and equipment managers	531	2%	639	2%	0	0%	0	0%
Office employees serving the public	829	3%	998	4%	71	0%	60	0%
ACCOUNTING EMPLOYEES, ADMINISTRATIVE OFFICERS. AND OTHER OFFICE EMPLOYEES	671	3%	1.104	4%	64	0%	197	1%
Accounting , financial and support production and transportation administrative	502	2%	901	3%	32	0%	99	0%
Office employees not serving the public	169	1%	203	1%	32	0%	98	0%
WORKERS OF RESTAURANT, PERSONNEL, PROTECTION AND SELLERS SERVICES	12.238	49%	11.741	42%	2.582	9%	3.513	10%
Workers in catering and personal services	12207	49%	11704	42%	2582	9%	3513	10%
Workers in the protection and security services	31	0%	37	0%	0	0%	0	0%
Trade and assimilated dependents	0	0%	0	0%	0	0%	0	0%
QUALIFIED WORKERS AGRICULTURAL, LIVESTOCK, FORESTRY AND FISHERY SECTOR	0	0%	0	0%	0	0%	0	0%
Qualified agriculture and fishing workers	0	0%	0	0%	0	0%	0	0%
CRAFTSMEN AND QUALIFIED WORKERS OF MANUFACTURING AND CONSTRUCTION INDUSTRIES	61	0%	178	1%	0	0%	0	0%
Qualified workers under construction	5	0%	5	0%	0	0%	0	0%
Skilled workers in metal, machinery and extractive industries	0	0%	0	0%	0	0%	0	0%
Skilled workers in the graphic arts, textile and clothing industries, food, cabinetmakers and artisans	57	0%	173	1%	0	0%	0	0%
INSTALLATION AND MACHINERY OPERATORS, AND ASSEMBLIES	40	0%	48	0%	0	0%	0	0%
Operators of industrial installations fixed machinery, assemblers and assemblers	13	0%	16	0%	0	0%	0	0%
Drivers and operators of mobile machinery	26	0%	32	0%	0	0%	0	0%
ELEMENTAL OCCUPATIONS	2.405	10%	975	3%	25.930	90%	29.825	88%
Unqualified workers in agricultural services and labour for fishing, construction, industry and transport	2405	10%	975	3%	25930	90%	29825	88%

3.2. Social care sector

The average personal service user (formal or informal) is a 70-80 year old person, with a considerable dependency and a medium-high income.

Usually, this service consists of a series of caring services or basic personal, domestic, social or health caring in order to increase personal autonomy and to help the clients continue, as much as possible, with their lifestyle:

- ✓ Domestic care: daily activities and tasks done in order to achieve a greater personal and familiar autonomy.
- ✓ Personal care: daily activities and tasks which seek the receiver's personal and social wellbeing.
- ✓ Educational care: activities which have the goal of promoting the acquisition of basic skills.
- ✓ Socio-community care: activities which seek the promotion of the person receiving the aid's participation in his or her community, in leisure: cinema, theatre, fairs, excursions, reading, and so on.
- ✓ Technical and home adapting aids: Activities which imply the functional adaptation of their homes, necessary to solve concrete and specific difficulties in their daily life.

The social assistance sector has a majority of people working with part-time and temporary contracts, which reduces stability and sustainability of employment in the sector and which encourages competitiveness among fellow unqualified workers. As said before, this is a women dominated sector and an important sector for low skilled people since it introduces them into the labour market. Despite the great insertion rate, it is not an attractive sector due to the negative image of the sector people have – bad working conditions, stressing environment, great worker rotation and a significant amount of people searching for other alternatives.

However, it is a rapidly growing sector with a great evolution projection due to, mainly, “the care crisis” (reduction of informal caring givers due to changes in family structures) and a request of greater specialisation of the sector which will make workers and companies need new skills to face future challenges (for instance, the incorporation of new technology in caring).

This is why more skills will be demanded in the employment opportunities that are to flourish, showing the growing complexity that these posts will be acquiring in the near future:

- Personalisation to the client
- Inclusion of professionals and teams in the offer of the service, which will require multidisciplinary team working skills
- IT knowledge due to the incorporation of technology in caring
- Communication skills

- Greater soft skills related to caring, such as empathy and interaction with patients and the ability to handle physical and psychological stress.

3.3. Target group

The target group selected in the Basque Country is that of low skilled people receiving the RGI (Income warranty rent) from the Basque Government

The Basque Country, from its government's department for social politics, which was created to face poverty and support social wellbeing, hands out a basic monthly aid to people and families who do not have enough resources so that they can face their basic needs and which also helps them to find working prospects. The following might be the receivers of the RGI:

- Unemployed people
- Employed people with limited resources
- Pensioners
- Immigrants without residence permit
- Etc.

The requirements are as follows:

- Constituting a coexistence unit at least one year before the date of filing the application
- To be registered and to have an effective residence in the Basque Country for at least the three previous years.
- Not to have enough resources.
 - To have a lower income than the monthly RGI that may correspond to the unit, depending on the number of members it has.
 - Not owning any property apart from usual residence (house, garage and storage room) or the property in which the labour activity is carried out (with exceptions).
Do not dispose of money, securities, vehicles or other property for a value higher than that established to collect RGI

Lanbide, the Basque employment programme, as the responsible and manager of these aids has every bit of information regarding the applicants and recipients of the RGI. For this project, the database of RGI receivers has been analysed. In this database, every member of each coexistence unit is register; the unity consists of the holder of the aid, and its beneficiaries (other members of the unity).

Taking into account the aim of this project, the training of low skilled people for their labour incursion, some groups have been eliminated from the database.

- AGE CRITERIA: Under 18s and over 65 year olds.
- EXEMPT TO WORK: people with disabilities, immigrants without a residence permit or without a work permit, persons in training for employment
- QUALIFICATION: more than compulsory studies.

The resulting database shows the following data:

	SEX							SEX					
	Men		Women		Total			Men		Women		Total	
16-19	233	47%	261	53%	494	100%	16-19	233	1%	261	1%	494	1%
20-24	907	44%	1.168	56%	2.075	100%	20-24	907	4%	1.168	5%	2.075	5%
25-29	1.716	44%	2.185	56%	3.901	100%	25-29	1.716	8%	2.185	10%	3.901	9%
30-34	2.428	44%	3.103	56%	5.531	100%	30-34	2.428	12%	3.103	14%	5.531	13%
35-39	3.352	48%	3.609	52%	6.961	100%	35-39	3.352	16%	3.609	17%	6.961	16%
40-44	3.579	52%	3.293	48%	6.872	100%	40-44	3.579	17%	3.293	15%	6.872	16%
45-49	3.046	51%	2.897	49%	5.943	100%	45-49	3.046	15%	2.897	13%	5.943	14%
50-54	2.590	53%	2.269	47%	4.859	100%	50-54	2.590	12%	2.269	10%	4.859	11%
55-59	1.921	53%	1.735	47%	3.656	100%	55-59	1.921	9%	1.735	8%	3.656	9%
60-64	880	45%	1.068	55%	1.948	100%	60-64	880	4%	1.068	5%	1.948	5%
over 65	96	37%	164	63%	260	100%	over 65	96	0%	164	1%	260	1%
Total	20.748	49%	21.752	51%	42.500	100%	Total	20.748	100%	21.752	100%	42.500	100%

There is no age-group or sex which stands out due to its relative importance among the receivers.

	Stateless		EU		Rest of Europe		Magreb		Sub-Saharan Africa		Asia		North America		South America		Spain		Oceania		Total		
		%		%		%		%		%		%		%		%		%		%			
16-24	1	0%	4	0%	142	6%	17	1%	296	12%	140	5%	36	1%	2	0%	335	13%	1.595	62%	1	0%	2.569
25-34	0	0%	20	0%	660	7%	65	1%	2.040	22%	852	9%	271	3%	0	0%	1.601	17%	3.921	42%	2	0%	9.432
35-44	4	0%	23	0%	644	5%	127	1%	2.704	20%	1.590	11%	359	3%	1	0%	2.153	16%	6.221	45%	7	0%	13.833
45-54	0	0%	6	0%	480	4%	88	1%	1.305	12%	692	6%	185	2%	0	0%	1.201	11%	6.842	63%	3	0%	10.802
55-64	1	0%	3	0%	194	3%	62	1%	296	5%	186	3%	43	1%	0	0%	482	9%	4.336	77%	1	0%	5.604
65-74	0	0%	1	0%	2	1%	3	1%	2	1%	6	2%	1	0%	0	0%	12	5%	233	90%	0	0%	260
Total	6	0%	57	0%	2.122	5%	362	1%	6.643	16%	3.466	8%	895	2%	3	0%	5.784	14%	23.148	54%	14	0%	42.500

According to the birthplace, 84% of receivers come from Magreb, South America or Spain (16%, 14% and 54% respectively)

	Men		Women		total							
	Without minors	With minors	Without minors	With minors	Without minors	With Minors						
16-24	207	60%	138	40%	79	14%	484	86%	286	31%	622	69%
25-34	2.164	75%	723	25%	798	22%	2.889	78%	2.962	45%	3.612	55%
35-44	3.637	67%	1.753	33%	1.494	28%	3.811	72%	5.131	48%	5.564	52%
45-54	3.557	76%	1.095	24%	2.574	63%	1.509	37%	6.131	70%	2.604	30%
55-64	2.138	90%	228	10%	2.230	96%	97	4%	4.368	93%	325	7%
65-74	79	96%	3	4%	141	99%	2	1%	220	98%	5	2%
Total	11.782	75%	3.940	25%	7.316	45%	8.792	55%	19.098	60%	12.732	40%

40% of the coexisting units are in charge of at least one under-age son or daughter. The number of aid-holding women in charge of children more than doubles the number of men in the same situation.

	RGI complementary to other labour related income		RGI for social inclusion and protection		Total	
		%		%		%
16-24	601	23%	1.968	77%	2.569	100%
25-34	2.908	31%	6.524	69%	9.432	100%
35-44	4.141	30%	9.692	70%	13.833	100%
45-54	2.664	25%	8.138	75%	10.802	100%
55-64	950	17%	4.654	83%	5.604	100%
65-74	6	2%	254	98%	260	100%
Total	11.270	27%	31.230	73%	42.500	100%

Only 27% of RGI receivers do so as a complementary aid to their work. The rest just have the RGI as their only money source.

SECTION 4. RESULTS OF INTERVIEWS

4.1. Relevance of the sector for low skilled workers

4.1.1. Relevance of the chosen sector for the selected target group

The home care sector offers many employment opportunities at the present and future times, due to an aging population, increased dependency and changes in family structure. The municipal home care services as well as other institutional solutions (residences, day centres, etc.) do not cover all the existing demand and households with dependent elderly people are increasing the hiring of care services at home. Moreover, the lower economic cost of home assistance against the entry into a care facility, the desire of the service users themselves to continue living in at home and the increasing specialization and professionalization of the sector, are all factors that contribute to the increase of the demand of the services at home.

With regard to the target group, care for the elderly at home is an attractive sector for the low-skilled unemployed people, given that there is great demand and that it guarantees the immediate incorporation into the labour market. The domestic and care sector is clearly feminized. It is a working group with a very specific profile, mostly women, immigrants and with little training - which identifies 85% of those in Spain. It is estimated that about 8,000 people work in the Basque Country as care assistants of dependent people, both in care facilities (day centres, residences, ..) and in homes.

As stated by Lanbide, the Basque Employment Service, the labour market insertion rate of people in these activities is above average compared to other sectors and is one of the great employment niches with respect to other activities, especially for people with low levels of qualification and groups in situation or risk of social exclusion.

For the Gaztaroa association, which works for the insertion of people at risk of exclusion and offers qualifying training in this activity, this sector is very suitable for people with low qualification profiles. In recent years it has become an employment niche for older women in long-term unemployment or immigrant women (mainly of South American and Romanian nationality) and in an irregular situation, in most cases with an educational level of primary education (ISCED -1) and low professional experience, which makes difficult their training. At the same time, it is a sector where the black economy predominates and where the assistants are contracted under the "cleaning activities of homes" category when in reality they are activities of care of people at home and where the precariousness of working conditions stands out.

4.1.2. Kind of jobs that the target group develops in the selected sector

Care is a precarious work sector and difficult to cover when the services are provided at home instead of in care facilities. The need for families with major difficulties in caring for their elders has been combined by the economic crisis and rising unemployment, with a greater impact on the less qualified population and the long-term unemployed, as well as the arrival of migrant women to the Basque Country in the absence of legal rights, without accommodation and in need of finding a fast job. In the sector today there is a coexistence of health care assistants without secondary education with others who have undergone degrees of VET and even with overqualified professionals.

This has caused that, over time, employment in the domestic sector is affected by low wages, precarious working conditions or the black economy, turning into a sector that is not very attractive for other more qualified profiles.

This sector is one of the great employment niches that especially affects women and, in addition, long-term unemployed and with worrying indicators regarding the quality of care due to the high temporality, wages to the low with little tendency to recovery and without respect to the qualification.

The activities / occupations in which this group of workers is employed in their sector are mainly two: house cleaning and caring for the elderly.

4.1.3. Existence of 'black (underground) economy' in the selected sector and in these occupation types and steps to overcome this

It is thus a sector where the black economy predominates and where workers are contracted under the "cleaning activities of homes" category instead of health care at home and where the precariousness of working conditions and irregular situations stand out. The interviewed companies distinguish according to the profile of the consumer: people who need home assistance, where it is evident that there is an underground economy in non-specialized functions (house cleaning, domestic work, basic care, etc.) and those who receive a public aid (dependency) and that they need the worker to be regularized and trained.

It is estimated that even today almost a third of the jobs generated by the care of the elderly move in the so-called black economy, without any kind of control. The economic and bureaucratic difficulties involved in hiring care assistants of the elderly entail that many of the people doing this work are part of the underground economy, which causes innumerable damages to families and to those who carry out these jobs.

However, the main change comes with the regularization of the sector in 2016, which requires that in order to become a health care assistant in the Basque Country (care providers, geriatric nurse, personal assistants and helpers at home) an official degree is required that accredits the professional competences. These Level 2 professional certificates are:

- Certificate of professional qualification SSCS0208 "Social and Health Care for dependent people in care facilities"

- Certificate of professional qualification SSCS0108 “Social and Health Care for dependent people at home”. This certificate qualifies for home care activities, such as:
 - Health home care assistant.
 - Home care assistant.
 - Care provider of elderly people, disabled people, and convalescent people at home.

Being a sector with great potential for employment generation, it is expected that this new regulation, which requires accreditation, will reverse the situation of the sector, as well as its invisible, feminine, precarious and less dignified and professionalized character. For the Basque Employment Service, regularization of the sector will continue to maintain the number of employment opportunities and dignify the profession, combat the underground economy and improve the working conditions of people working in the home care sector. Care assistants of dependent people - both those who work in care facilities and home assistants and those who fit the personal assistant in the houses - will have until 2022, to comply with the Dependency Law.

There are many people who work in social-health care or as home care assistants; most of them do not have official qualifications that accredit the necessary training. It is estimated that of the 8,000 current workers, about 3,000 do not have the necessary accreditation. In this line, training for qualification, i.e. obtaining a certificate of professional qualification, would enable low-skilled jobseekers to improve their level of employability, since the recruitment ratios are high and could regularize the situation of the workers in the sector, improve their working conditions and increase their professional opportunities. The interviewed companies point out that the professional path ways are, in order of more to less desired, the jobs in the public health sector (Osakidetza), followed by care facilities, municipal services of home care services and lastly, the care services at home . Accreditation would allow this professional progression with better working conditions.

For jobseekers, this training for qualification would officially recognize these people who are competent in this profession, enabling a coherent training itinerary that would increase their training and facilitate access to professional promotion, favoring the possibility of labour mobility and social recognition.

4.1.4. Problems of low skilled workers in finding and maintaining employment in the selected sector

Up to now and in recent years with a growing demand, it has been a sector of rapid labour insertion and with few requirements for non-professional care assistants. As stated by Lanbide, the Basque Employment Service, the labour market insertion rate of people in these activities is above average compared to other activities and is one of the great employment niches with respect to other activities, especially for people with low level of qualification and groups in situation or risk of social exclusion.

As of 2022, the accreditation of the certificate of professional qualification of Social-Health Care for dependent people at home or of the Social Health Care Certificate for dependent people in care facilities will be obliged to comply with a normalized job in the sector and for its maintenance. In order to obtain this accreditation, training actions have been arranged as well as the mechanisms for the recognition of professional skills acquired through work experience.

According to the department of vocational training for employment of Lanbide the social health care sector is one of the professional families where greater opportunities for training for qualification currently exist within the program of vocational training for employment, both for unemployed people and for employed workers in these activities. In the present year, 900 centres have delivered this type of training.

Lanbide highlights that their priority within the target audience of these courses are those unemployed people without professional certificates, that is to say those with levels of 0 to 1, the objective of this training being to enable the person to perform a job. The people receiving the minimum guaranteed income (RGI) represent 30% of the total number of unemployed people in the Basque Country, and this same ratio remains among the beneficiaries of the training activities delivered by Lanbide. In this line, the Basque Employment Service considers that the participation ratios of RGI beneficiaries in these training actions are positive.

However, for the companies and for the social entities that work with this group, this training does not always reach low-skilled people who are already performing these tasks at home under other working conditions.

On the one hand, the companies in the sector indicate that the companies employing staff for home care services find that the market is not as demanding with regard to accreditation as in the case of care facilities, municipal home care services, etc. where this accreditation is required. On the other hand, there are also many obstacles to training the people currently working in the sector who lack the necessary accreditation, since they are middle-aged women with family responsibilities and working for hours, who often cannot afford to spend an entire morning training, being more complicated still in the case of the boarding staff.

The social organizations who address this training for unemployed people in situations of social exclusion, also point out that one of the main obstacles to access this training is the admission test or not have the professional certificate of level 1. In many cases these people do not pass the admission tests to courses in vocational training centres because they require previous training where they are trained in basic skills (language, mathematics, social skills, etc.). That is to say, these people demand a tailored itinerary of labour insertion in addition to coaching throughout the process that motivates them until obtaining the certificate of professional qualification.

Although there is a lot of training in this specialization, it is not easy for people at risk of exclusion to access it in existing vocational training centres, since they do not offer prior training or do not prepare them for the admission test, do not flexibilize or adapt the schedules

to common situations in this group (family burdens, difficult schedules, ..) and sometimes, they cannot access due to their irregular situation (i.e. immigrant women). In fact, the interviewed vocational training centre points out that the profile in the last 5 years has mainly belonged to adults with a long career without a degree, nevertheless, in the last two years we see a rebound of young population with this vocation.

4.2. Training, Participation, Engagement and Recruitment

4.2.1. Academic competences/skills needed to work in the selected sector, in the kind of roles that low-skilled people are employed in

The typology of roles that are demanded for the people who work or want to work in the home care sector are focused on the performance mainly of the following tasks:

- Personal care tasks: Hygiene and care of the person, physical-motor assistance, mobilizations, preparation of meals, control of medication, accompaniment ...
- Domestic tasks: Maintenance of the environment of the person, shopping, clothing care, detection of risk situations in the house ...

To a lesser extent, the workers in this sector also have to perform tasks related to socio-community participation or integration in the environment (accompaniment to trips outside the home, walks, leisure activities in the home, recreational tasks, psycho-affective support, facilitate the relationship with family and friends ...)

The recognition of the qualification required by Law for the performance of this service is done through the Level 2 Certificate of professional qualification, which is an official document that accredits the professional skills that a person has for the development of a meaningful work activity for employment. That is, it determines the training required for this profession in the labour market: the required academic qualification and the necessary technical skills.

Thus, the certificate of professional qualification on Social and Health Care for dependent people at home accredits the people in the general competence to "Assist in the socio-health field in the home to people with special needs of physical, psychological and social health, applying the strategies and more adequate procedures to maintain and improve their personal autonomy and their relationships with the environment." In the case of the certificate of professional qualification on Social and Health Care for dependent people in care facilities, it accredits the people in the general competence to "Assist dependent people in the socio-health field in the care facilities where they're delivering their services, applying the strategies designed by the interdisciplinary competent team and the procedures to maintain and improve their personal autonomy and their relationships with the environment."

There are two ways to obtain the professional certificate, either through the training actions arranged to obtain the certificates (training primarily addressed to unemployed people), or through the mechanisms of recognition of professional skills acquired through work experience, the latter aimed at workers in the sector.

Through training:

- After passing all the training modules that make up the certificate of professional qualification through a course delivered by an authorized centre.
- Through the accumulation of partial accreditations of the units of competence, through the training modules associated with the modular catalogue until completing all the training of the certificate of professional qualification

Through work experience and / or non-formal learning pathways:

- Through the mechanisms for the evaluation and accreditation of professional competences. Accreditation of professional experience is a process that consists of three phases: advice (where experts identify the existence or lack of skills), evaluation (evaluation tests) and accreditation.

The main contents are:

Certificate of professional qualification	Training
<i>Certificate of professional qualification SSCS0108 - Social and Health Care for dependent people at home</i>	MF0249_2: Hygiene and health home care; MF0250_2: Psychosocial home care and support; MF0251_2: Home assistance and family feeding; MP0028: Module of non-work professional internships.
<i>Certificate of professional qualification SSCS0208 - Social and Health Care for dependent people in care facilities</i>	MF1016_2: Support in the organization of interventions in the institutional field; MF1017_2: Intervention in the hygienic-alimentary attention in institutions; MF1018_2: Intervention in social-health care in institutions; MF1019_2: Psychosocial support, relational and communicative care in institutions; MP0029: Module of non-work professional practices.

4.2.2. Current Training in the sector for low skilled people

In the case of the Basque Country, there is a wide range of training actions in this area through the different calls, accessible in all three territories. The training is provided by vocational training centres, both public and private, throughout the Basque Country, as well as by collaborating entities accredited by the Basque Employment Service, that are working for the inclusion of people in situation or risk of social exclusion, organizations of the third sector and local entities.

Every year, Lanbide, opens different calls aimed at private and public vocational training centres (with a budget of 37 million euros), as well as other special programs with a budget of about 5 million. The special programmes include the strategic actions of commitment of contracting and the singular actions that deal with integral projects with itineraries of actions of employment and training.

The training actions consist of a theoretical and practical training where students learn to develop physical and psychosocial home care interventions aimed at people with social and health care needs and to develop activities related to the management and operation of the

home. Theoretical modules consist of approximately 400 hours and work practices of between 120-140 hours.

During 2016, in the Certificate of professional qualification SSCS0208 "Social and Health Care for dependent people in care facilities" and in the Certificate of professional qualification SSCS0108 " Social and Health Care for dependent people at home" a total of 110 courses were provided and around 2000 people obtained the accreditation.

CALL 2016: SPECIALTIES RELATED TO CARE FOR ELDERLY PEOPLE										
	Ordinary Call- private		Ordinary Call- public		Recruitment commitment		Singular		Total	
	Courses	Students	Courses	Students	Courses	Students	Courses	Students	Courses	Students
<i>Certificate of professional qualification SSCS0108 " Social and Health Care for dependent people at home"</i>	20	360	10	160	2	30	1	13	33	563
<i>Certificate of professional qualification SSCS0208 "Social and Health Care for dependent people in care facilities "</i>	60	992	8	130	6	60	3	47	77	1229
TOTAL	80	1352	18	290	8	90	4	60	110	1792

Locally, the training offer is also widely available in the three territories of the Basque Country, with a total of 107 providers between vocational training centres and collaborating entities of Lanbide that offer training in social and health care to dependents in care facilities and 68 in the case of social and health care for dependent people at home.

While the offer is broad, available locally at the level of the three territories and with broad participation ratios, the accessibility for job seekers perceiving the RGI (guaranteed minimum income) may not be as high. Following the general ratios of participation of the job seekers receiving RGI (guaranteed minimum income), approximately 30% of the beneficiaries of the courses would correspond to our target audience, about 550 people. However, experts stand out that the requirements for access to training of Certificate of professional qualification Level 2 (secondary level studies or certificate of professional qualification level 1 or pass an admission test that shows enough training or professional knowledge) tend to be an obstacle for people who are working or demanding employment in this sector, because usually, they present primary studies or they do not pass the admission test, being necessary previous training that allows them to access the training to obtain these accreditations.

In social organizations such as Sartu, they work full insertion itineraries or pathways and in addition to this qualifying training level 2 for the accreditation of the competences, they offer previous level 1 training. To access level 1 training there are no previous training or professional requirements. This course lasts 150 hours, where basic mathematical skills, Spanish language and basic digital skills are approached.

4.2.3. Training on companies for low skilled people: motivation and barriers

Many of the companies working in the sector directly offer this qualifying training accreditation for their workers (approximately 30% of companies). For those companies who offer this training, the challenge lies in the fact that this training is not demanded by the households, so since it is not necessary, most of the workers working at homes are non-professionals in this area. It is a big difference in relation to the care facilities sector, where they are more demanding with the accreditation of their workers.

In the case of one of the companies that was not offering training to its workers, they highlighted the difficulty of adapting to the existing training offer. The issue is the profile of these people, middle-aged people with family responsibilities and working for hours who cannot afford to attend training an entire morning. This company was also considering the option to become a collaborating agency to be able to provide this training directly to their workers, although they considered a difficulty the requirement of an own premises and the added challenge of searching job internships which is one of the modules required to obtain the certificate of professional qualification.

In any case, all companies consider that vocational training is the key. Until 2016 no accreditation was required and this had no effect on the workers who were currently involved in these processes or on companies or entities providing care. However, since 2016 the requirements relating to professional qualifications are required and also necessary to professionalize the sector, to dignify it and to avoid non-professional care. The problem is how to reach this collective.

They also indicate that other non-formal or non-approved training courses would also be necessary, especially in social and health skills and business management.

4.2.4. Funding the training

In the Basque Country the training actions of certificates of professional qualification offered by the public and private training centres and collaborating entities of Lanbide are 100% subsidized for unemployed people. These courses are aimed at unemployed people but employed workers can participate, up to a maximum of 40% of the total students, being completely free for them (continuous training offer). When the company is requesting specific training for their workers (demand training) this is subsidized (derived assignment of the social security quotas), covering totally or partially the course depending on the budget of the course.

The budget approval for qualified actions in the Basque Country 2017 (obtaining certificates of professional qualification) has been 24 million euros. It has been one of the regions with the highest budget on vocational training for employment in the State. Of these 24 million euros, approximately 12% is allocated to training actions in the professional family of socio-cultural and community services, being the second which receives more budget from the 23 professional families, just behind the family of Mechanical Manufacturing. Regarding the people working in these activities, of all economic aids to carry out strategic training actions that are developed by companies in the Basque Country between 2016 and 2017 (continuous

training), the training actions in the certificate of professional qualification SSCS0108 (social and health care for dependent people at home) and SSCS0208 (social and health care for dependent people in care facilities) receive 20% of the total budget; 860,000 euros of a total budget of 4,300,000 euros.

4.2.5. *Difficulties and barriers to achieving a higher participation rate from people belonging to the target group?*

- Market difficulties:
 - ✓ Lack of demand of the certificate of professional qualification accreditation by the market. Although the new sector regulation requires competence accreditation, households in need of care for their elders are not demanding this qualification yet. This does not happen in the case of care facilities (councils, residences) where the corresponding accreditation is required. There is a lack of awareness by families regarding the need for this personal attention service to be offered by professionals.
 - ✓ The need to adapt the union agreements of the sector. One of the problems of this competition is the cheapest price in the case of underground economy and non-professional profiles. Given the higher cost of a social and health care assistant against another who is not, companies of the sector in Bizkaia (one of the three Basque territories) also have to compete with a union agreement which provides a high price per hour (with an average difference of approximately 10 euros per hour). This price is marked by the services offered by public institutions (home services), but in the private market it is not a competitive price, although it affects all workers in the sector.
 - ✓ Companies are required to have certified professionals but the problem is that they are not certified and that they lack the time to obtain the certificate leaving the elderly without care. Also the conditions of public tenders are very restrictive for such services: 5 years of experience, more than 7,000 hours of training,... and small companies must compete with the big ones that dominate the market (EULEN).
 - ✓ The lack of work experience is also an obstacle to access the sector and enter in a home, especially for these profiles in situation or risk of social exclusion.
- Difficulty of access to training / accreditation:
 - ✓ Many of the people who work in the sector or want to access a job in the sector do not access the training actions to obtain the certificate of professional qualification level 2 for not passing the admission test or having the required degree (compulsory secondary or certificate of professional qualification level 1). In many cases these people require previous training where they are trained in basic skills (language, mathematics, socio-occupational skills,...).
 - ✓ The courses offered by vocational training centres are not flexible enough or do not adapt to the schedules and particular needs of this group. These people demand a personalized pathway of employability in addition to an coaching throughout the entire process to motivate them to reach the certificate of professional qualification. Moreover these are not institutions used to working with people in situation or risk of social exclusion, level 1 training is not offered and since they are highly demanded training

- actions, others are prioritized (people demanding training with more standard courses with intense training, during working hours,...)
- ✓ It is a feminized sector where women predominate, many of them with complicated family situations. It is pointed out as one of the obstacles to a greater participation in the sector and in the training actions the lack of empowerment of women, usually with setting barriers (women with family obligations).
 - ✓ It is a sector where there is also a very high representation of immigrant women, who in many cases do not have a work permit. People in an irregular situation can participate in the training actions, while they cannot receive their certificate of professional qualification until they have regularized their administrative situation. They may also experience difficulties in communicating in the language and need basic literacy skills.
 - ✓ One of the obstacles identified by Lanbide it is that due to the deadlines of the calls for funding for the training activities of vocational training centres, these courses are concentrated in the second half of the year. Lanbide is currently working to make this training available throughout the year opening multiannual calls with training throughout the year.

4.2.6. *Factors to motivate low skilled people to complete their training*

For many of the interviewees the most important issue is to facilitate access to training. It is a highly demanded training because it has immediate access to the labour market, more options for professional development and for improving the working conditions of the people are now working in the sector. Thus, within the professional career of our target audience, it is very attractive but nevertheless they are the last ones selected in the offer of vocational training centres given their particular conditions and difficulties.

It is necessary to flexibilize the training offer by adapting the courses, schedules and didactic material as well as the education methodology to these profiles. It is also necessary to develop integrated itineraries of training-insertion that include from the level 1 training (in basic skills) until the process of accompaniment throughout all the training action.

4.2.7. *Monitoring job outcomes (if they get into employment after the course)*

There is an ongoing monitoring of the results on labour market insertion by vocational family levels by the Basque Government's Employment Department. As the authority that funds the training activities, the results on labour insertion are taken into account for the subsequent allocation of the training budget. The high weight of training actions on our sector within the total budget of vocational training for employment in the Basque Country is due both to a high demand for training by job seekers and to their high labour insertion rates, after training, around 51%, when the average of the rest of vocational families is 45%.

Social entities working with our target group also follow up the data of insertion of the trained people and they too consider that the employability in this sector is very high after obtaining the Vocational Training Diploma or Professional Qualification Certification. Also vocational training centres are beginning to carry out monitoring of the employment status of their students.

4.3. Skills gaps and barriers.

4.3.1. *Main gaps in employability (transversal -e.g. non-job specific skills- and personal skills) in the target group?*

Regarding transversal skills, the high levels of responsibility and autonomy needed to provide care at home are highlighted as key elements for job performance. Such care involves satisfying or solving (partially or completely) the needs and problems of the users, addressing occupational hazards (both physical and emotional) and performing a wide range of technical work skills (knowledge of diseases, hygiene techniques and mobilization and a wide range of interpersonal skills). The main gaps in the sector are the need to provide professionals with greater skills in:

- Organize, prepare and control, contributing to the planning and monitoring of care individual plans.
- Observation for the detection of needs, active listening and reaction capacity
- Collaboration with other professionals involved and contribution to the adequate response to the needs of the user.
- Good communication, a fluid relationship with the family and / or main care providers (inform, guidance,)
- Control and manage one's emotions.

4.3.2. *Main gaps in academic skills and qualifications of this group*

The interviewees point out the need to improve professional qualification of the workers especially related to the lack of specific training in home assistance, inadequate training for the services provided, lack of updating of training, and the lack of motivation or lasting involvement in the workplace.

Some companies point out the need to increase training in social, psychosocial, psychological and dietary aspects. The desirable complementary training would be:

- Mobilization techniques
- Technical and hygiene standards
- Prevention of pressure ulcers
- Management of work-related stress
- Preparation of meals and special diets
- Care of patients with mental health problems and terminal patients
- First aid
- Behavior modification
- Confidence
- Code of Ethics

In addition, companies point out the importance of training in active guidance through the entire process of home care, providing tools for professionals to be able to detect early signs

of certain diseases (dementia, Alzheimer, etc.) and to develop with the patient the recommended exercises, as for example mental training.

4.3.3. *Necessary Skills in the medium future (5-10 years)*

Vocational training centres in the Basque Country are in charge of foresighting the skills that will be required in the future (due to their close relationship with the companies) and of communicating these needs and proposals to face them to the Basque Employment Service.

One of the challenges detected is the growing digital divide as a generational and situational issue. Technological developments will have a significant impact on care services. There are more and more devices and applications available to the general public related to health management, control of medical records and communication with professionals. The use of electronic diagnostic health and healthcare delivery tools will increase the need for personal care workers who are aware of technological changes, new software and applications available in the market to respond to the needs of patients; and to be able to use them or help customers to have knowledge of them. Taking into account the growing need to increase the digital skills of current and future workers in the sector, some training entities have proposed to increase training in this field.

Health care assistants will also require observation skills to check physical and mental health (ability to detect illnesses, complicated situations, etc.) in supporting basic activities of daily living. Observation skills will also be important for following the rules and protocols in order to avoid potential risks to patients. It will increase the demand for new services and communication skills, active listening, clarity of expression and negotiation skills. In this same line team work skills (working collaboratively, the use of ethical codes...), will grow in importance in the future.

There is still a strong need to work with autonomy, responsibility and confidentiality. The need of a close relationship with the family will grow, taking into account that in the future we will have smaller households, more single households and few family networks.

Regarding the special diets, interviewees emphasize that the use of specialized home delivery food services will increase in the future.

4.4. **Good practice and automation**

4.4.1. *Established good practices and policies which have helped achieve the involvement of the target group within the sector and best results*

Identified good practices:

- Integrated training programmes and job placement itineraries developed by non-profit social entities:
 - In addition to the adaptation of teaching methodologies and didactic materials to low skilled people, their particular situations and special conditions are taken into account to reach the qualifying training: longest training itineraries, flexible

schedules, support from educators and individual tutoring and personalized attention, material adaptation, practical learning, motivation, follow-up in companies,.. Non-profit social entities also offer basic training on level 1 focus on basic skills for those without the necessary qualification to access the professional training actions or who have not passed the admission test. These integrated training programmes and job placement itineraries are totally funded by the Basque Employment Service under the Singular Projects call.

- In some cases those itineraries also have a commitment to hiring where a subsidy is offered for hiring the trained person, facilitating their access to the labour market and providing low skilled people with work experience.
- It is also considered a good practice the business model of *work integration social enterprises (WISEs)* that work as care providers and are promoted by the social entities. The work integration social enterprises are non-profit economic initiatives whose social object is the coaching and socio-labour insertion of unemployed people in situation or risk of social exclusion, with special difficulties to access the labour market. During a period of two years these people are hired in this sector approaching a learning process that provides them of social skills, labour, basic training and job qualification. Not only are they rewarded with a qualified training but also with work experience for having been working in the sector for some years.
- Policies and sector regulations, active employment policies focus on vocational training and aid scheme to promote recruitment of professional care assistants:
 - Regularization of home care activities with the Resolution of November 3, 2015, of the Ministry of Social Services and Equality, which requires professional accreditation.
 - Active employment policies: In comparative terms, the Basque Country is the Autonomous Community where more funding is directed to vocational training for unemployed people. Moreover, the vocational training actions on these activities are one of the most economically supported of the whole professional families. In relation to low skilled people the budget in recent years for low skilled people receiving the RGI (guaranteed minimum income), shows that the training projects focus on them, developed by nonprofit social entities, has noticeable increased in expenditure through the public calls for aid to the work integration social enterprises and to Singular Projects. It also highlights the call for employment and training with a commitment to recruitment for the training and recruitment of unemployed youth in the framework of the Youth Employment Operational Program 2014-2020.
 - Regional Council of Gipuzkoa, one of the three Basque territories, offers financial aid to hire a health care assistant for the care of a dependent person (from 300 to 833 euros per month depending on the degree of dependency of the beneficiary).

Some proposals for best practices in the future:

- Options for acting on the demand side:
 - Support the hiring by companies or families of qualified professionals: checks to procure services subsidizing the cost of employment, subsidized social

- contributions or tax deductible expenses that ensure that the amounts are used exclusively for the payment of certified companies or accredited professionals.
 - Campaigns to raise awareness among families about the need for professional care.
 - Development of social clauses on public procurement that gives priority to contract work integration social enterprises or low skilled people who have been trained through integrated training programmes and job placement itineraries.
 - Increase the control measures related to inspection of Work and Social Security in the home care services to avoid 'black economy'.
- Prioritization of low skilled people receiving the RGI (guaranteed minimum income) in public policies:
 - Positive discrimination in favor of this group in professional training courses on this sector and positive discrimination in favor of nonprofit social entities in the distribution of the budget for the training actions.
 - Increase training actions at the basic levels.
 - Specific development of training and job placement programmes for this sector, facilitating labour insertion and as a solution for those people in irregular situation who need a work contract to access training.
 - Increase the possibility of working in protected work environments. Confidence on organizations in charge of following-up, tutorial and supporting would be better for both working people and families

4.4.2. *Probability of automation in the next 10-15 years of the low-skilled jobs in these sector:*

4.4.2.1. *Jobs or activities subject to automation in the next 10-15 years?*

For all the interviewees, home care activities present little risk of automation (some agents estimate the probability of 10% automation in the next 10-15 years). This is mainly due to the need of elderly for being treated humanely.

For policy makers and social entities, the care sector remains very personal and it is difficult to automate; the technology will advance but human contact and personal care will still be necessary. The personal touch is fundamental to people who are in a very vulnerable situation, they need time, active listening, respect,.. Technology will support the performance of the service and improve the patient's quality of life, but only as a tool. In this there will not be substitution, just more technological support to improve activities related to physical effort or communication: space adaptations, articulated beds, information and communication with multidisciplinary teams and medical consultations.

4.4.2.2. *Impact on training centres and the way of training of low-skilled people*

There will be no substitution of workers for greater technological advance but more and more digital skills will be required by home care assistants. There is already a digital divide which affects low skilled people so training on basic digital skills is addressed both by nonprofit social entities and by vocational training centres. Lanbide highlights as one of the best practices the incorporation of training modules in digital skills that address some of the vocational centres

that provides training on these activities. From the nonprofit social entities the digital skills learning is addressed on level 1 of basic training modules.

In the future, the need for these skills and the adaptation to specific technologies will be increased (health management devices and applications, control and exchange of medical records, consultations to professionals, etc.) as well as the knowledge of other technological advances. It will be a specific training module to incorporate into the professional training of these future workers. In fact, some vocational training centres incorporate practical training modules related to domotics, so that students can check the relevance of the technological aspect in their future profession.

4.4.2.3. Impact on organisations

Companies of the sector emphasize that, in the future, the most easily automated activities will be related to mobility, cleaning and monitoring and follow-up of patients. In both areas, the use of technology or greater technological advances would facilitate the development of the tasks but it cannot occur a direct substitution.

SECTION 5. SOME CONCLUSIONS ABOUT THE IDENTIFIED OPPORTUNITIES

- The home care sector offers many employment opportunities at the present and future times, due to an aging population, increased dependency and changes in family structure. Given that there is great demand it guarantees the immediate incorporation into the labour market.
- Care for the elderly at home is an attractive sector for the low-skilled unemployed people. It is estimated that about 8,000 people work in the Basque Country as care assistants of dependent people, both in care facilities and in homes and it is clearly feminized, mostly are women, immigrants and with little training.
- Care is a precarious work affected by low wages, precarious working conditions or the black economy; it is not very attractive for other more qualified profiles. It is estimated that even today almost a third of the jobs generated by the care of the elderly move in the so-called black economy.
- To tackle this situation, the regularization of the sector in 2016 requires an official degree in order to become a health care assistant in the Basque Country (care providers, geriatric nurse, personal assistants and helpers at home): "*Certificate of professional qualification SSCS0108 "Social and Health Care for dependent people at home"*". Regularization of the sector will continue to maintain the number of employment opportunities and dignify the profession, combat the underground economy and improve the working conditions of people working in the home care sector.
- It is estimated that of the 8,000 current workers, about 3,000 do not have the necessary accreditation so currently. In the other hand, the social health care sector is one of the professional families where greater opportunities for training for qualification currently exist within the program of vocational training for employment, both for unemployed people and for employed workers. The funding for training comes from public budgets.
- For the companies and for the social entities this training does not always reach low-skilled people. Among the causes, lack of demand of accreditation from the market (households) and lack of specific training and didactic methodologies adapted to the personal/social conditions: vocational training centers do not offer prior training for preparing low-skilled people for the admission test (it is needed the admission test or to have the professional certificate of level 1), there is no adapted schedules and training itineraries to common situations in this group (family burdens, difficult schedules, irregular situation).
- Home care activities present little risk of automation. This is mainly due to the need of elderly for being treated humanely. Regarding the future skills, high levels of responsibility and autonomy needed to provide care at home are highlighted as key elements. In addition, the use of electronic diagnostic health and healthcare delivery tools will increase the need for personal care workers with digital skills.
- Among the good practices identified today highlights: 1) the integrated training programmes and job placement itineraries developed by non-profit social entities (teaching methodologies and didactic materials adapted to low skilled people, offer basic training to access the professional training actions, subsidy for hiring the trained person and work integration social

enterprises) and 2) the policies and sector regulations (regularization of home care activities, active employment policies focus on RGI beneficiaries and financial aid to hire a health care assistant).

- In the future will be needed campaigns to raise awareness among families about the need for professional care, development of social clauses on public procurement that gives priority to low skilled people, support the hiring by companies or families of qualified professionals or increase the control measures.

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