



Funded with support from
the European Union's
PROGRESS Programme

THE SKILLS PANORAMA: ACHIEVING NATIONAL AND REGIONAL IMPACT (ARLI)

Demand-Side Analysis Country Report

Country Report **Italy**

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August 2013

About the project

The ARLI project seeks to utilize a system of mutual learning to gather and intelligence good practices from regional and sub-regional experts across the partner countries and to use this to support both the new EU Skills Panorama but also the existing very large number of regional intelligence providers, many of whom are members of the European Network for Regional Labour Market Monitoring (ENRLMM). Innovative policies and practices will be analyzed and shared. ARLI has two core objectives:

- The first is to support the implementation of the new EU Skills Panorama by utilizing the expertise of both partners and the ENRLMM, interrelating the Panorama with existing skills forecasting provision, achieving greatly enhanced impact and added value for the Panorama.
- The second is to use a good practice approach to explore how existing regional and local provision of skills forecasting can be enhanced for stakeholders through interrelation with the Panorama.

The first step of the project consists in the realization of interviews with labour market stakeholders aimed at studying what LMIs they use, why they use and how they use them, and what information they don't find that they would need. The interviews aim to outline the utility of the EU Skill Panorama and identify perspective for its improvements in the future.

About the stakeholders

In this project "stakeholders" are defined as institutions interested in knowing the conditions and dynamics of the labour demand and supply and are then potential users of LMIs. The choice was made on institutions which, if not exclusively, operate in the regional labour market of Lombardy. The list of the Stakeholders that have answered to the questionnaire (mainly by face-to-face interviews but also by phone and Skype) are reported in Appendix 1

About the labour market intelligence

In this project, Labor market information and intelligence (LMI) is defined as:

"analyzed, processed, directed, and/or regularly collected information and intelligence about the labor market, which is provided by a source (internal or external) that is not temporary or spontaneous in its provision of the information that the providing organization uses to plan their activities in order to achieve its overall goal"

LMI may account for published or internal reports, databases, industry councils or similar forms of structured meetings, structured networking and a variety of other forms of intervention to generate information and knowledge as defined above; and inform of such things as number of vacancies in one or more parts of the labor market, as well as the type of vacancies it concerns; about general trends in the labor market, or if activities are starting up or closing down within your particular field of analysis; about skills and qualifications that employers are looking for, and the skill levels and competencies that people have; demographic trends in the labor market, at national, regional or local level; and much more information and analysis which satisfies the above restrictions in the definition.

About the author

CRISP –Interuniversity Research Centre on Public Services – was founded in 1997, and consists of an interdisciplinary academic network conducting high profile research and studies in the field of services. The centre features several resident researchers specializing in different disciplines and its premises are located at the University of Milano Bicocca.

The centre's competences are the result of contributions from several disciplines - information systems, economics and management, statistics, social sciences and legal sciences – and aim to develop and improve productivity and innovation in services. The mission of CRISP can be summarized as follow: research and innovation in the design, management and evaluation of services.

A variety of projects are carried out with public and private partners, at both national and international level, both within and outside academia, involving multiple themes and competences mainly applied to the welfare sectors, such as labour market, healthcare, education and training.

With reference to Labour Market Intelligences, CRISP is involved in the following project:

- management of the Regional Labour Market Observatory of the Lombardy Region,
- evaluation of active labour market policies in Lombardy Region ;
- management of the Regional Labour Market Observatories of Piedmont Region and Emilia Romagna Region;
- management of about 30 provincial level observatories within Lombardy, Piedmont and Emilia Romagna;
- evaluation of higher education attainments sponsored by a consortium of Italian universities.

1. Introduction

In the present report will be shown the results of the first phase of the ARLI project. The aims of the research conducted in Italy was to study, with a sample of labour market stakeholder, the LMI that was used, at how they used it and at what they needed that they could and could not find. Moreover the study aims to collect evaluations about the European project EU Skill Panorama and identify suggestions for its future development.

As in Italy the main functions in the area of labour market policies and services are structured by regions the study has been conducted in the specific context of Lombardy Region. Twelve representatives from the same number of institutions were interviewed between April and July 2013. The selected stakeholders are all organizations which operate within the regional labour market, even if not always exclusively, and have a specific or potential interest in the use of LMIs. It also allow to represent the diverse population of institutions operating in and for the regional labor market, including regional government, development agency, public employment services, training providers, recruitment agencies, career guidance, employees' and employers' associations, NGOs and political parties (a full list of the stakeholders involved is reported in the end of this document).

The **goal** of the study was twofold:

- the first refer to the use of LMIs and the stakeholders were asked about the LMIs they use, for which purposes, which resource are available to them to use LMIs, in which way they use LMIs and which are information they need and that actually they have difficult to find.
- The second relate to the evaluation of the EU Skill Panorama and stakeholders were asked to give their own opinion about the utility of this new informative tool revealing elements and possible improvements which may ensure the development of this informative tool in the future.

After a brief description of the main changes affecting the Italian labour market and the overall LMI architecture, the evidences which are emerged from the interviews are reported in the section 2 and 3; the first mainly focused on the evidence about the adequacy and impact of LMIs, while the latter includes the stakeholders' evaluation of the EU Skill Panorama. Finally, some conclusion are synthesized in section 4.

2. Demand and supply of LMI in the Lombardy region

2.1 Italian labour market changes

Some of the economic and institutional changes affecting the Italian labor market have made it clearer the need for LMIs and information on the dynamics of labor and employment, in order to support the design of effective employment policies and services.

Flexibility, dynamicity and change are factors which characterized the modern Italian labour market; in respect of the past, Italy is experiencing a strong growth in both job turnover, and occupational, contractual, and professional mobility. Moreover, the economic crisis emerges with evidence in the actual dynamics of labour market, characterized by a sensible reduction of the job opportunities, a substantial increase of the

unemployment rates and also an increase in the use of temporary contracts by the employers. As results, the traditional Italian employment policies, mainly based on the safeguard of the lifetime job, are losing their capacity in responding to the needs of both firms and workers, and the attention of decision makers is rather on active labour market policies aimed at promoting flexibility and security for all.

Recent institutional reforms have modified the functioning of the labour market. A comprehensive reform of the labour market was implemented in Italy in the '90s which gave significant autonomy to regional governments in these areas of policy; since the 1990s there has been a significant devolution of functions relating to labour market policies and services, which has changed radically the relationship between the central government, the regional governments, and local governments¹. Moreover, the two national laws n.469/1997 and 30/2003, have abolished the public monopoly in the provision of employment services opening the labour market to private – profit and non profit – providers (labour market intermediaries), which were to coexist with the traditional Public Employment Services (*Centri per l'Impiego* - CPI)². Finally, as far as training and employment services are concerned, the Italian reform grants to regions wide freedom in the choice of the specific model to be adopted for the management and provision of employment services³.

2.2 The LMI infrastructure

Lombardy is one of the 21 regions of Italy located in the North-West; the capital of Lombardy is Milan and the region is divided into 12 provinces. A sixth of Italian population lives in Lombardy and about a fifth of Italy's GDP is produced in the region, making it the most populous and richest territory in the country. It has traditionally a strong industrial vocation but it has experienced a growth of the services sector since the 1980s. Lombardy has been part of the association "Quattro motori per l'Europa" since 1988 and is considered to be not only one of the most industrially developed areas but also one of the driving powers of the economy of the entire European Union. In general, the good performance of Lombard labour market in the national context is well shown when activity, employment and unemployment rates are compared with the corresponding ones at country level.

The LMI's infrastructure at disposal to regional labour market stakeholders can be distinguished by national and regional/local information systems.

The **national LMIs** provide information at national level, disaggregating some of the information by regions and sub-regions. *Istat* (*National Institute of Statistics*) for example, provides regularly (annually and quarterly) information about employment, unemployment and activity rates, by age, gender, citizenship,

¹ Based on the principle of vertical subsidiarity, the institutional-administrative system was re-defined in order to increase the local dimension, with the assumption that policies and services would have been more effective if they were closer to users, and therefore designed on their specific needs.

² According to the national law n.30/2003, public, private (profit and not for profit) and "special" employment services - universities, foundations, chambers of commerce, secondary schools, business associations, and others - need to obtain an authorization at the national level to provide services such as intermediation, temporary work provision, recruitment, training, and so on.

³ Public and private providers may seek accreditation at the regional level, and thus become instruments of active policy and receive public resources to perform the related necessary activities. Regional governments are bound to create a list of all private and public accredited providers of employment services, and to define rules and norms for accreditation and for cooperation between private and public providers. The Italian situation assumes that public and private actors learn to operate and cooperate in creating networks of policies and services for the "employability" at the local level, with the aim of providing effective quality services to citizens and businesses.

type of contract, economic sector, etc., and it offer many information disaggregated by regions and provinces (e.g. activity, employment and unemployment rates). *Inps* (*National Institute of Social Security*) provide information on many aspects of labour market based on its own administrative data sources (e.g. annual statements of earnings for social security purposes and data on the unemployment benefits). With reference to information about labour demand *Excelsior*, is one of the major sources of information available; data are collected on a sample of about 100.000 Italian enterprises, updated on an annual basis, providing a variety of information disaggregated by region, which are focused on occupations demanded by firms and the main characteristics of the job vacancies. On the same topic, *Isfol*, regularly provides the results of an annual survey aimed at analyze the skills needs for occupations, due to the technological and organizational development (this survey is based on the O*Net framework).

The **regional/local LMIs** provide data and information which specifically relate to the regional territory, allowing to monitor and understand the labour market and economic trends within the specific region and its provinces. A relevant role today is played by the *Regional Labour Market Observatories (RLMOs)* which are constituted by regional laws in Italy; in recent years, there are different regions that are activated creating their own labour market observatory and since 2011 the national network of RLMOs counts 18 partners belonging to as many Italian regions. They are public organizations which are in charge to collect, integrate, analyze, and disseminate data and information on the labor market, as well as to assess the results achieved through the active labour market policies implemented at regional level. Data provided are of administrative nature including the Mandatory Communications, and then data collected continuatively, including all the new employment contracts (hirings) and expired contracts. From the analysis of these kind of data it is possible to describe the working dynamics of the labour market mainly observed from the demand side. The same data are used by the *Provincial Labour Market Observatories*, which provide information specifically geared to the provincial and local labour markets.

2.3 Adequacy and impact of LMI infrastructure

In this section it is summarized the content deriving from the interviews done with the 12 stakeholder of Lombardy Region.

2.3.1 Use of LMI

All the stakeholders affirm to use both national LMIs, such as Istat, Inps, Excelsior and regional/local LMIs, such as data which come from the Regional and Provincial Labour Market Observatories. Some of them also make use of “not institutional” LMIs, and then information and reports which are provided by local institutions with specific competence, which are mainly oriented to offer data on sub regional areas – e.g. districts – and on specific sectors (this kind of data are provided for example by the employers’ associations). The public bodies, and in particular policy makers at regional and local level, use their own database and then are both users and providers of labour market information in the region (e.g. ARIFL, EUPOLIS, and PROV-MI). Also other public and private institutions have their own database that they periodically use only for internal purposes (it is the case for AFOL and OL).

In general the stakeholders consider LMIs fundamental tools necessary to support their decision making. The scopes to use LMI vary significantly by the type of stakeholders. In particular, it is possible to distinguish the scope of policy makers at regional and local level and the development agency to be focus on the

programming of policies and interventions for the labour market. On the other part, the services' institutions use information to define organizational strategy and design service to specific targets. Many actors, and in particular the private ones, have underlined as the process of using information to project strategic actions was incremental until the forecast of sectors trends. Employees associations for example, affirm that the real support to decisions provided by LMIs becomes real through vision and description of labour market trends given during phase of discussion.

Despite the relevance of data and information on labour market, frequently other external factors influence policies' and services. Many stakeholder indicated that their decisions are often influenced by social and economic events in the regional territory; for instance, the future event of EXPO 2015 that will be placed in Milan was pointed many times as a source of potential employment opportunities for the next few years. Another influent factor regards the labour laws and reforms (very frequent in the last years) which strongly influence decision and choices about policies and services. Other influencing factors emerge from different stakeholders: for the private institutions, the competitors' behaviors and in general the dynamics of their competitive environment have an influence on their choice and strategies; for the public bodies financial availability is an important constraining factor, as the meritocratic founding system to public bodies is based on the results they are able to reach. Finally, for policy makers and representative bodies the most of the pressures in the time of economic crisis come from the mass-media and citizens, which both strongly can influence their decision in the short-term.

All of the stakeholders are interested in the use of LMIs for the short-term planning and decision making (less than 2 years) rather than for the long term (from 2 and five years). In general, the decisions and actions of both policy makers and services' institutions today are mainly oriented at the short-term, and this is also due to the crisis which has fostered the most, including regional and local policy makers, to design and implement policies' interventions on an annual time span. Moreover, for the public and private institutions the term of programming activities is usually related to the annual budget that needs a cost design, which can be monthly adjusted during the year. In this regard, only the training providers seems to be actually interested in the long-term planning, as they are forced to have a longer vision because of the length of their courses (3-5 years).

Despite their interest for short-term planning, the most of the stakeholders affirm that the existing LMIs and specifically that focused on anticipation of skill needs, are mainly useful for description of the labour market trends and dynamics rather than for effectively support the decision making. This is mainly due to the absence of updated information, such as the number and types of job vacancies in a specific territory or sector, and the fact that such systems are often based on past information, rather than on updated information and future trends, and then they can serve to get a general idea about the firms' labour needs, but are not absolutely useful to make specific choice in terms of policies and services.

Stakeholders usually use a mix of quantitative and qualitative data; quantitative data are mainly provided by the LMIs at both national and regional level and they are useful for understanding the labour market trends. Qualitative information are often directly collected by each institution, through surveys, interviews or just through the direct relations that each institution has with workers and employers. This is the case for training provider which mainly use information deriving from relations with enterprises, for the employees and employers associations which use a mix of quantitative and qualitative data, and for regional government which aside with quantitative data use qualitative information, especially the cases of dispute (1.200 annually) with firms, followed through all the media (press, blog, etc.).

The most of stakeholders look at LMIs which are able to provide information at regional and/or local level. Indeed, in terms of geographical coverage the main interest of the stakeholders regards the regional and local level as the daily activity of the most is concentrated, if not in an exclusively way, in the Lombardy Region. Despite this, many stakeholders, and in particular policy makers, development agencies and employees' and employers' associations, look also at the information related with the national and sometimes the international contexts, just to do comparison between Lombardy and the Italian and European labour market trends. Within the other stakeholders, private and public employment agencies have an interest for national and international data as they are active not only in Lombardy but also in other national (e.g. PESs), and European regions through many headquarters (e.g. OL).

Apart from the regional policy makers and development agency, when stakeholders use LMIs they usually focus their attention on specific sectors or group of occupations; despite this, both the sectors and the group occupations' targets are continuously subject to change. Employers' associations for example, are mainly interested in the trends within the main sectors of their associated firms (this was traditional the industrial sectors but now also the services sector is playing a stronger role). Training providers generally use data which cover the sectors where their courses are targeted to (e.g. plumbing, mechanical, etc.) but they put attention also on sectors that could express potential needs in the future. Also the private employment agencies prefer data on specific sectors but the decision on which sector to focus on can vary subject to the their competitive strategy. For PESs the principal client are traditionally disadvantaged workers and unemployed people, which are continuously subject to chance also due to the effects of the economic crisis; PROV-MI for example, described as in the past the PESs were used by disadvantage people and then their interest was mainly on low skill groups of occupations and low level professions; on the contrary today the requests coming to their offices regard both low, medium and high skills and then their interest in terms of sector and occupations is changing consequently.

In general, the attention of the stakeholder is both for the supply and demand sides of labour market. Following their discourses, it emerges that the most of LMIs allow finding information about workers and people who are looking for a job. The most missing thing on this aspect relate to information regarding unemployed people included in security systems. On the contrary, the existent LMIs offer little information about the labour demand and in particular about the characteristics of the job vacancies. In this regard, the demand side analysis seems to be complicated as important aspects cited by the stakeholders relate to soft skills (such as personal and behavior characteristics) which are very difficult to monitor and standardize through the existing statistical framework.

Despite both demand and supply of labour market is considered, it is difficult to find information about the matching process. In particular, the services' institutions often criticizes the absence of an evaluations of their services, in order to know if their activities has bring to "good" or "bad" matching and if people and firms are respectively satisfied by the jobs offered and the human resources provided. Moreover, the matching analysis seems to miss some important variable, and in particular the level of salary and working conditions; for regional policy makers this aspects could not be neglected as it is fundamental to really understand and explain the results of the matching process and in particular the mismatch phenomena which still exists in the Italian and regional labour market (the salary and working conditions offered by the firms may explain why firms get many difficulties for covering certain type of occupations, despite the number of unemployed people constantly grows due to the effects of the economic crisis).

2.3.2 Available resources to use LMI

The major part of the stakeholders has always used LMI and labour market data, since they were founded. In many cases the process and the quantity of information consulted was increasing during the time until some study centre born inside the organizations. Moreover, the crises played a pushing role: many stakeholder declared that the beginning of the crisis in Italy (2008) outlines the necessity for a greater structure for LMIs consultation, which accordingly, is becoming a more consolidate and organized process within the most of the interviewed stakeholders.

It is possible to classify two main groups of stakeholders, distinguishing between institutions which have an internal statistical office and/or staff specifically dedicated to use LMIs, and institutions that even if make use of LMIs, do not dedicate staff to this kind of activities. Accordingly, the two group differ in terms of the way they use information, make analysis and disseminate in internally and externally.

- The first group is composed by ARIFL, EUPOLIS, PROV-MI, ASSOLOMBARDA, OL which have an internal statistical office, or just people in charge of this kind of activities; they regularly analyze data coming from external LMIs, use data from their internal database and sometimes also collect direct and qualitative information through survey and interviews with firms and workers, or also using administrative data for statistical purposes. Within this group, someone is involved in dissemination activities to the public (this is the case for example for ARIFL, EUPOLIS, PROV-MI, ASSOLOMBARDA and OL). When dissemination happens, it is through websites, newsletters, seminars (where the presented analyzes support the discussion with the other stakeholder about the best actions to make), book's publication, periodic reports and scientific publications. A lot of stakeholders that dedicate resources to analyze LMIs also collaborate with other organizations, such as the Regional and Provincial Labour Market Observatories, Universities and research centres (e.g. CRISP is one of the most cited partners for labour market analysis within the regional territory) or even through the collaborations with single specialized professors, researchers and/or consultants.
- The second group of stakeholders include PES, CDO, CGIL, UIL, INTOO, GALDUS, and ASLAM, which use information but their activity is not structured within the organization (there are not specific staff in charge for this activity). In these cases the institutions just look at the information provided by the LMIs without making their own analysis, collecting directly information and/or publishing any kind of labour market information for the external audience

In general almost all the stakeholder, both public and public institutions, affirmed that they are not evaluated in a systematic way on the use of information they do. When exists, the evaluation is mainly indirect, and is included in the overall evaluation of the organizational effectiveness (e.g. if the organization is going well then maybe also the analysis of LMIs is going well). For some stakeholders indirect indicators of their efficacy in the way they use information consists in their capacity to be a "centre of interest" for the external public and for the clients/users of their services (this is the case of development agency, employees' and employers' associations, local government and NGO).

2.3.3 Existing gaps and information they would need

From the interviews emerge a strong need to improve the existing LMIs. A common judgment is that existent LMIs at both national and regional level actually provide many and diversifies information about labour market trends. Despite this, the stakeholders expressed a substantial dissatisfaction related to the presence of a plurality of LMIs which seems to cause an overlapping of intervention areas, work methodologies and a

consequent waste of resources. To solve this problem, the most suggest to rationalize the existing information; a possible solution could be represented by the creation of one or few points where they can access information and find all the relevant data they need to understand the labour market.

If the quantity of data does not seems to be a problem, stakeholders ask for a stronger integration of the existing data, which may ensure an high quality of the existing LMIs. In this regard, stakeholders suggest the necessity for a stronger collaboration within the information providers at national, regional and local level, in order to share the different kind of information they produce (e.g. an integration of information of the demand and supply sides of the labour market). The main problem here is the fact that each information providers disseminate its own data and there is not a real exchange and integration within different data source (e.g. Mandatory Communication, Istat, Inps, Excelsior, etc.). This is due to the fact that the information providers are generally not available to share their own data, as they consider this information strategically important for them, and sometimes also a source for their competitive advantage (this is the case for private institutions, such as employment agencies). Exchange and communication is lacking also at national and regional level, and between provinces, in the same or in another region, contributing to reduce the overall transparency of labour market.

Despite the presence of many information which are obtainable from different LMIs, some important information are still missing. It emerges a critical dissatisfaction which relates to the information provided about labour, occupations and skills' needs of private and public organizations in the market. In particular, the most cited problem refers to the absence of recent and actual information about the demand of labour which come from firms. Stakeholders outline as in Italy, differently to other European contries, it is impossible to access information about the job vacancies. Some tentative have been made on this topic in the past, through specific toll at both national and regional level, but this projects failed due to the scarce involvement of firms and labour market intermediaries to provide the public with their own information about the open job vacancies (if entrepreneur are not involved and they don't see the utility of information, they will not be induced to give information). For the interviewed stakeholders, this problem may be resolved by introducing some kind of incentives which may favor the exchange and publications of information by all the relevant actors. This shortage reduces the overall transparency of the labour market and the ability of the labour market institution to provide unemployed people and employers with effective services, which may contribute in reducing the mismatch phenomena; according to the stakeholders' discourse, the existing information about labour demand are just estimations which seem not to be really useful for them to take decisions and concrete actions.

Apart from the theme of job vacancies stakeholders are quite interested in having access to LMIs which provide forecast of labour, occupations and skills demand of firms; this is actually not existent in Italy and the stakeholders suggest that it may be implemented but with some specific characteristics. The priority within the interviewed stakeholders is for short-term forecasting (one or maximum two years) which may allow the design and adjustment of policies and services, while forecast on medium-long term would be mainly useful for long term planning (which is actually the aim for the training providers) and in general to have an idea of the future labour market trend.

The LMIs on the labour, occupations' and skills' needs should be improved by the provision of specific data and analysis which are summarized in the following list:

- analysis disaggregated by macro and micro-sectors;

- detailed description of occupations and skills required by private and public organization
- level of the salary for each job vacancy and the general working conditions offered by the employers;
- attention to local districts (observatories specifically dedicated to provide information about local districts may be created);
- comparison and benchmark within regions and within provinces of the same regions;
- geographical detail of labour demand which goes until the provincial level;
- updated data, in order to give a real support for decision-making;
- Raw data for own analysis;
- labour demand combined by sectors, occupations and skills.

Stakeholders affirm that if such kind of LMI will be developed, they would have the chance for improving the overall efficacy of their policies and services which are targeted at both the supply and the demand sides of the labour market. In particular, services oriented to support people in their career changes and professional advice would be better because they would be *ad hoc* thought and based on real data; moreover the quality of the overall matching would be improved bringing positive effects to employers, which may find the human capital they need, and to workers who would have the opportunity to experiencing a professional career within the specific organization and/or profession.

3. Current and potential use of the EU Skill Panorama in Italy

None of the Italian stakeholders had seen or heard about the project EU Skills Panorama prior to the interviews, although most of them are attentive to the European initiatives/projects in the field of the labor market. Despite this, all the interviewed stakeholders were very much interested to learn more about the project and also to give their contribution for the development of this tool in the future. They specifically consider the idea of creating a single point of access to information about job vacancies, occupations and skills very interesting, as they have outlined that this is a substantial lack within the Italian LMIs. In few cases emerged from the stakeholders a sort of “skepticism” related to the implementation of a new LMI, which they consider likely to add to others LMIs that already exist not only at national but also at European and international level (e.g. Eurostat), and which risk to make further complex for the finding the necessary information about labour market.

After a brief look at the site, the most appreciated the overall usability of the site, and in particular the fact that, thanks to the structure of the home page, it allow the users intuiting the information provided by the site and the way they can be accessed from the outset. On the other hand some criticalities has been emerged. Firstly, it seems not immediately clear where the data and analysis provided come from, and in particular which are the original data sources. Secondly, a substantial difficulty within the Italian stakeholder emerges to understand data provided in a language that is different from their own (Italian); the fact that the most information in the site are available only in English substantially reduce the usability of the site representing a strong barrier for their future and effective use.

The most positive element of the EU Skills Panorama seems to be the fact that it fills an information gap that still exists in Italy, and which is related to the lack of information on labour, occupations and skills demand. As pointed out by several stakeholders, the possibility to find in one place as much information - processed

data - on the working realities at national and European level is a great value for them. At more operational level, the site seems to be mainly useful for the stakeholders in order to understand the national and European trends in terms of labour demand. If this is already a positive contribution of the initiative, the site seems not to be very useful for planning and decision making in the short terms due to the characteristics and the nature of data which are included. Accordingly, the EU Skill Panorama seems to be of greater interest for those stakeholders who are interested knowing and analyzing the national and international labour market, and in part for those who has to take decisions oriented to the medium-long term (e.g., policy makers, professional training agencies, etc.). On the contrary it is less useful for those who are in charge of employment services (e.g. private and public employment agencies.) needing updated information to support their brokerage activity.

The features of the data included in the site that may reduce the overall utility of the EU Skill Panorama relate to the geographical coverage and the updating. First, respondents identify among the most critical aspects of the site the absence of any links, information and analysis to regional and local data (as noted in the previous sections the main interest of the stakeholders interviewed is about their knowledge of the trends at regional and local level); this shortage may limit the concrete usefulness for both descriptive and decision-making purposes. Another factor that seems to preclude the interest of the stakeholders for future uses of the site is the level of data update. With reference to Italy, for example, in June 2013 the "recent data" refers to 2000-2008 and those on the current situation to 2011; the reference periods are judged too dated to allow an effective use of the site, even if only for descriptive purpose. Although the problem may not be related to the management of the site, but rather to the frequency with which the national information sources provide the data, it is desirable to guarantee a more updating of data and information in order to increase the usefulness of the platform for the stakeholders.

The model chosen to represent data is considered substantially simple, clear and pleasant. Stakeholders positively evaluate the fact that the information are made available already processed; indeed, this make immediate to grasp the dynamics and characteristics of the labour demand. On the other part, the chosen model seems useful when the scope is to reach specific information (e.g. grasp the trends of labor demand in a specific sector and / or for a specific profession), but it makes it harder, if not impossible, to carry out analysis of aggregate type and make benchmarks to get an overview and a synthesis of labour, occupations and skills demand. In addition to the tables and micro data, stakeholders suggest the opportunity to add graphs and more intuitive ways to present aggregate data (e.g. histograms, pie charts and maps); moreover, given the specificity of the information, it could be particularly desirable to use the geo-referenced data, a tool that can make easier and more immediate comparing labour market information between countries and local areas.

According to the discourse of the stakeholders, some information should be added to the EU Skill Panorama so that it would become more attractive and usable by the Italian labour market stakeholders. The first refer to information about professions and skills demand covering the regional and local level; for example, links to the data, analysis and publications of the regional LMIs (e.g. regional labour market observatories) should be added to the site. A second concerns the inclusion of more updated information on labor, occupations and skills demand; at least in the Italian case, it might be provided information coming from the administrative sources (e.g. Compulsory Communications) which are able to capture most of the current dynamics of the labor market, even if they may be more difficult to interpret and could complicate the comparability of data between European regions. Finally, for the most of the stakeholders seems reasonable to (1) translate all the information in italian, (2) show the contact information of the national partner who is

responsible for managing the site's, and (3) receive more information about the activities and the events organized by the EU Skills Panorama.

4. Concluding remarks

The survey conducted has shown that the use of information is widely spread among the stakeholders operating in Lombardy Region, whether they are policy makers or services' institutions. Moreover, some trends of change, both of economic and institutional nature; seem to make the use of LMIs of growing interest among national and regional stakeholders. As consequence LMIs are today considered by the labour market stakeholders a necessary tool which become always more strategic for decision making process and to improve the effectiveness of their interventions to promote employment and economic development.

The interest of the regional stakeholders in terms of type of information desired varies by their typology. In general emerges a common interest for both quantitative and qualitative data, which are focused on the regional and local level and diversified by sub sectors and professional groups. The main scope to use LMIs is that of planning and supporting the design of policies and services in the short-term. Despite this, in many cases, the actual LMIs structures do not allow this but just to get a general idea of the context in which the operators move and will move over the years. In particular, it emerge for Italy a serious shortage of really reliable forecast information about labour, occupations and skills needs expressed by private and public organizations. Where this information exists (e.g. Excelsior and Isfol) it is considered difficult to use and substantially not useful due to the fact that they are too dated and partial to really support the decision making.

As consequence of the lack of useful information about occupations and skill needs, the majority of stakeholders rely more on informal channels, rather than formal ones, to get information to support their decision-making. Indeed, alongside the official statistics the most affirm to get strategic information mainly through the contacts and the constant relations they maintain with both firms and worker). Surprisingly, this informal source of information seems to be actually more strategic for the stakeholders than the official ones, and they use it specifically when the scope is to understand and forecast the request of labour, occupations and skills from the private and public organizations; consequently the designing of policies and services for matching purposes are actually base more on informal information rather than formal and institutionalized LMIs.

As consequence, it emerges a need for more structured and useful information provided by the LMIs. In particular, the Italian stakeholders outlined that, in order to be more effective, LMIs should provide more updated information about job vacancies (as it is the case in other European countries). LMIs should then provide detailed information about job vacancies within specific local area and sub sector, the kind of soft and hard skills requested by the employers and the working condition they offer to the candidate (in particular the level salary). It is important that they refer to the existent open job vacancies, rather than, as it is actually the case, to the past working opportunities. In this sense, the stakeholder evaluate positively the hypothesis of some kind of forecasting analysis about labour, occupations and skills needs, which actually are not provided by any national or regional LMIs; as outlined, to be really effective such forecasting analysis should be more oriented to the short-term (less than two years) than to the long-term trends.

Finally, the EU skills Panorama and the information offered at European level could represent a valuable tool for the Italian stakeholders. This initiative seems to fill an information gap related to the anticipation of demand for occupations and skills. Moreover, as it is actually structured, the site looks very easy to use and accessible, increasing the likelihood that the stakeholders will use and consult it in the future. In order to render the EU Skill Panorama more effective in terms of support to policies and services' design for policy makers and labour market intermediaries, some changes and improvements has been proposes, which mainly relate to the inclusion of information about the regional and local situation, and a more updating of information about the professions and skills' demand.

Appendix 1: full list of the stakeholders

Full name	Short name	Type of Stakeholder	Profile
Agenzia Regionale per la Formazione, l'Istruzione e il Lavoro	ARIFL	Regional Government	Public agency and the technical component of the regional system for the implementation of regional policies in the field of education, training and employment. In particular, ARIFL provides support to the regional government in the designing of active labour market policies and it is in charge to manage the businesses' crisis
EUPOLIS Lombardia	EUPOLIS	Development agency	Regional institute for research, statistics and training; it provides information and knowledge to the regional government supporting the designing and implementation of regional policies in many fields
Assessor for labour of the Province of Milan	PROV-MI	Local government/ political party	The province of Milan participates to the definition of labour market policies at regional level; it is also responsible for managing the Public Employment Services and for implementing the active labour market policies
AFOL Milano	AFOL	Public Employment Services (PESS)	The local network of Public Employment Services of Milan which offer employment and training services to unemployed persons and who is looking for a job
Galdus	GALDUS	Training provider	Training institution which offer professional training courses and employment service to youth and adult, both employed and unemployed; the agency is also authorized by the Lombardy Region to provide training and employment services within the public employment policies
Aslam	ASLAM	Training provider	Training institution offering professional training courses mainly targeted to young persons, unemployed people, and employees; the agency is also authorized by the Lombardy Region to provide training services within the public employment policies.
Obiettivo Lavoro Spa	OL	Recruitment agency	Private Employment Agency offering to firms and workers services of temporary jobs, recruitment, training, outplacement, HR outsourcing; the agency is authorized by the Lombardy Region to provide employment services within the regional labour market policies.
Intoo Spa	INTOO	Career guidance	Private agency which offer outplacement services to

			public and private organization, and counseling for the management of professional career and development to the persons; it is part of GiGroup, a private employment agency providing a variety of employment services to both organizations and workers
CGIL Lombardia	CGIL	Employees' representative	the biggest labour union in Italy; at regional level it take part in the definition of employment policies through a frequent discussion with the regional government and the other parties involved
UIL Milano-Lombardia	UIL	Employees' representative	Labour union which is responsible for the management of labour relations at sector level and for the definition of employment policies at regional level
Assolombarda	ASSOLOMBARDA	Employers' representative	Employer association focused on industrial sectors, which offers services to its associates like information on labour market and support for the recruitment of the labour force
Compagnia delle Opere	CDO	NGO/Employers' representative	NGOs which was set up as an association between businessmen that thanks to national and local agreements with qualified partners, including banks, recruitment agencies, insurance companies and large enterprises, offers to its members support in areas like certification, energy, HR recruitment and finance
