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

DEMAND SIDE (USERS OF LMI) ANALYSIS

Country Report: **The Netherlands**

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1. Table of Contents

1.	Table of Contents	2
2.	ABOUT THIS PROJECT.....	3
3.	ABOUT THE AUTHORS.....	3
4.	ABOUT LMI.....	3
5.	ABOUT THE STAKEHOLDERS	4
6.	Introduction.....	4
7.	Demand and supply of LMI	6
7.1	National LMI Infrastructure	6
7.2	Regional and Local LMI Infrastructure	7
8.	Adequacy and impact of the LMI infrastructure	9
8.1	Awareness of and response to labour market information.....	9
8.2	Current use of LMI	9
8.3	LMI in the short and long term.....	10
8.4	Users' thoughts on their LMI needs.....	10
8.5	What LMI is missing?	10
8.6	Resources and sharing of LMI.....	11
8.7	Expert Reflection	11
9.	Current and potential use of the EU Skills Panorama in the Netherlands	11
10.	Concluding remarks.....	12
11.	Appendix 1: List of Stakeholders.....	13
12.	Appendix 2: (optional) Glossary of Terms	13
13.	Appendix 3: (optional) References	Fehler! Textmarke nicht definiert.
	(Your Contact details and address).....	Fehler! Textmarke nicht definiert.

2. About this project

The ARLI project seeks to utilise a system of mutual learning to gather and intelligise 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 analysed and shared. ARLI has two core objectives:

- The first is to support the implementation of the new EU Skills Panorama by utilising 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.

3. About the authors

In 1998 the Centre for Work, Income and Health (KWIZ) was established. In the past 15 years, KWIZ found its way to organizations such as national and local governments, industry organizations and health and welfare organizations. The product range covers the whole field of work, income, health care, welfare and youth. KWIZ evaluates policy, conducts research and analyzes customer information systems for information management and monitoring. KWIZ also supervises and advises local and national government organizations and companies in social change, collaboration, innovation and organizational issues.

4. About LMI

In this project, labour market information and intelligence (LMI) is defined as “analysed, processed, directed, and/or regularly collected information and intelligence about the labour 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 labour market, as well as the type of vacancies it concerns; about general trends in the labour 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 labour market, at national, regional or local level; and much more information and analysis which satisfies the above restrictions in the definition.

5. About the stakeholders

For the ARLI project, 12 semi-structured face-to-face expert interviews were conducted:

- Two representatives of a regional or local government
- A representative of a training provider
- A representative of a recruitment agency
- A representative of a employee insurance agency
- A representative of a development agency
- A representative of a careers guidance
- A representative of a school
- A representative of a political party
- Three representatives of a employer/trade union/sector skills council (National)

Every one of these stakeholders is situated in the province of Groningen. Three stakeholders have a working area as big as the three northern provinces (Groningen, Friesland, and Drenthe). All of the stakeholders use LMI for the job. One of their main tasks is searching for data.

Type organisation	Name organisation	Stakeholder	Function
<i>University of applied sciences</i>	Hanzehogeschool Groningen	Zwannie Slagter	Manager
<i>Employee insurance agency</i>	Werkplein Groningen	Roelof vd Velde	Manager
<i>Trade union</i>	FNV-lokaal	Arnoud Hoogsteen	Policy officer
<i>Municipality</i>	Gemeente Veendam	Klaas Steenhuis	City council member
<i>Recruitment and selection agency</i>	Talenter	Dirk Zandlever	Director
<i>Municipality</i>	Gemeente Winsum	Ernst Ottens	Director
<i>Company</i>	Molnycke	Henry Koning	Manager
<i>Branche-organization</i>	Vno-ncw	Sjoerd Wind	Manager
<i>School/carreer counseler</i>	Goapubliek	Jeroen Maas	Re-integration advisor
<i>Municipality</i>	Gemeente Opsterland	Sipko van Til	Re-integration advisor
<i>Joint venture (municipalities)</i>	Regio Twente	Paul Mollink	Labour advisor
<i>Municipality</i>	Gemeente Leek	Willy de Boer	Policy officer

Why these stakeholders are chosen?

The stakeholders were chosen from our own network of labour market specialist. They represent the greater part off all the institutions in the northern region of the country that work with or provide labour market information.

6. Introduction

“The Netherlands Country Report (CR)” is one of six Country Reports written within the scope of the ARLI project (“The Skills Panorama: Achieving Regional and Local Impact”). The basic approach of the project aims at studying two related subjects. At a general level, the first is to study how the LMI (Labor market information and intelligence) infrastructure functions in the studied regions. More specifically, the second

purpose is to promote the use of the recently launched LMI “EU Skills Panorama” (EUSP) and study how this tool can be improved. For these purposes, 12 Stakeholders have been identified and involved to contribute with input to the ARLI project, of which all in the Groningen region account for the basis of this particular CR. The Stakeholders are also expected to attend as key actors in the National Stakeholder Workshop, to take place at the beginning of next year.¹

Groningen is a province in the most north-eastern part of the Netherlands. In the east it borders the German state of Niedersachsen, in the south the province of Drenthe, in the west the province of Friesland and in the north the Wadden Sea. It has a population of almost 580.000 people, of which almost 200.000 live in the capital city, also named Groningen. The province has a total area of around 3000 km² (including around 2350 km² land and 650 km² water). The population density is 242 inhabitants per km².

The province of Groningen is divided into 23 municipalities. The capital city is by far the largest in terms of inhabitants, companies and jobs. In general the province is an agricultural area: 70% of the surface is farmland, which makes Groningen one of the largest agricultural areas in the Netherlands.

The number of economically active persons amounts almost 400.000. The largest employment sectors are health and welfare (18,6%), trade (14%) and business services. Employment in the industry (for years the largest employer) continues to decline.

Groningen is one of the provinces with the largest unemployment rate in the Netherlands. The unemployment rate in 2013 is 9,8%². Slightly more men than women are unemployed and 62% is older than 40 years. The regions of Delfzijl (north) and eastern Groningen even have the highest unemployment rates of the country. These regions are facing serious socio-economic challenges over the last couple of years, arising from shrinking and ageing population and high unemployment rates. In eastern Groningen for example 5% of the working population is working via a so-called ‘WSW job’. These are jobs especially created for people who have difficulties working in a regular work environment. The average percentage of people working in ‘WSW jobs’ in the Netherlands is 2,5%.

The average commuting distance in Groningen is 22 kilometers³, which is significantly more than the national average of 14 kilometers. The majority of the commuters go back and forth to the city of Groningen. The presence of several regional offices and business units of large enterprises, headquarters of the Gasunie and the NAM, large residential institutions (the UMCG (hospital) is the largest employer in the northern part of the country) and the University of Groningen provide an incoming shuttle over 55.000 workers per day.

These commutes are necessary because the number of jobs in this work area is higher than the labour force. However, the most pressing overall problem for the Groningen economy is not the low employment due to a lack of jobs which can be provided. The biggest problem is the relatively low employability of the labour force, as well as the shrinking, ageing and the decline of the youthful part of the population in the rural areas.

¹ See the Appendix for more information on the ARLI project and the Stakeholders involved, as well as the definition of LMI used.

² The general unemployment rate in the Netherlands is 7.9%. Basisset regionale arbeidsmarktinformatie Arbeidsmarktregio Groningen UWV februari 2013.

³ Kwartaalbericht regio’s ING economisch bureau 2013.

7. Demand and supply of LMI

7.1 National LMI Infrastructure

The most important source for LMI in the Netherlands is the “Central Bureau for Statistics” (CBS). This organization processes a large amount of data on several social themes such as the labourmarket, education and inhabitants. A second important source of LMI is the “UWV WERKbedrijf” (This is a national employment service. The task of this organization is to develop and publish labourmarket statistics, both at national and regional level. The UWV WERKbedrijf is put to this task by the Ministry of Social and Labour Affairs.)

Table 1: Overview sources for (national) LMI in Groningen

Subject	Source
Employment	ISA, Stichting LISA
	Arbeidsrekeningen, CBS
	Enquête Beroepsbevolking, CBS
	Employment en wages; Statistiek Werkgelegenheid en Lonen, CBS
	Job files: Banenbestand, CBS
	Arbeidsvraagpanel, SCP
	Nationaal Zakelijk Bestand, Cendris (en andere bestanden van arbeidsorganisaties)
	Employment statistics: Uitzendstatistieken CBS
Jobs	Vacatureregistratie, UWV WERKbedrijf
	PAR, Nielsen Media Research
	Jobfeed, Textkernel
	Vacatures in Nederland, UWV WERKbedrijf
	Kwartaalenquête Vacatures, CBS
	Structuuronderzoek Vacatures, CBS
Labour force	Bevolkingsstatistiek, CBS
	Sociaal Statistisch Bestand, CBS
	Bestanden (pensioen)verzekeraars
	Salarisbestanden
	Trendrapport Aanbod van Arbeid, SCP
	Instroomonderzoek Uitzendkrachten ABU, Ecorys
	Cijfers aantallen werknemers MOE-landen, CBS
	Statistieken omtrent zzp'ers
Education	Onderwijsgegevens, DUO/Cfi
	Onderwijsstatistieken, CBS
	Colo-Kubussen mbo-inschrijvingen en mbo-diploma's
	Registers erkende leerbedrijven kbb's
	Gegevens HBO-Raad over hbo-inschrijvingen en hbo-diploma's
	VSV-Cijfers, OCW
	LBK-TKMST, Blauw Research
	Research centre for education and the labour market (ROA)
Jobseekers	Werkzoekendenregistratie UWV WERKbedrijf

	CV-databases, onder andere Textkernel
	Jeugdmonitor, VWS/CBS
	Enquête Beroepsbevolking, CBS
	Sociaal Statistisch Bestand (SSB), CBS
Benefits	Bijstandsuitkeringenstatistiek (BUS), CBS
	Re-integratie door Gemeenten, CBS
	WSW-Statistiek, Research voor Beleid
	Publiek Overzicht Resultaten (POR) WSW, SZW
	WW-uitkeringen, CBS
	AO-uitkeringen, CBS
	Registratie WW, AO en re-integratie arbeidsgehandicapten, UWV WERKbedrijf
Shuttle	Onderzoek verplaatsingen in Nederland, CBS/RWS
	Hoofdbanen naar woon- en werkregio, CBS
Supply and demand	Structuuronderzoek Vacatures, CBS
	Krapte-indicator, UWV WERKbedrijf
	Arbeidsmarkt naar opleiding en beroep, ROA
	Schoolverlatersonderzoeken, ROA/IVA
	Schoolverlatersonderzoeken, Toppen
	Kansopstage.nl/Colo-barometer, Colo/kbb's
	Kansopwerk.nl, Colo/kbb's
	Studie en Werk, SEO Economisch Onderzoek
	Studiekeuzedatabase, studiekeuze123.nl
	Nationale Enquête Arbeidsomstandigheden (NEA), TNO/ CBS ism SZW
	Arbeidsmarktgedragonderzoek (AGO), Intelligence Group
	Nationaal Onderzoek Arbeidsmarkt (NOA), Stichting NOA
	Vacatures in Nederland, UWV WERKbedrijf
	Enquête Beroepsbevolking, CBS
	Sociaal statistisch bestand (SSB), CBS

Source: Research voor beleid/EIM (2010)

For prognosis about economics, society and demographics, the “Centraal Planbureau” (CPB) is the most important organization in the Netherlands.

Table 2: Overview most important resources LMI forecasts

Forecasts	Macro-economische prognoses, CPB
	Arbeidsmarktprognose, UWV WERKbedrijf
	Prognose kerngegevens MKB, EIM
	Referentieraming, ministerie van OCW
	Kwartaalbericht regio's, ING Economisch Bureau
	(Regionale) bevolkingsprognoses, CPB

All presented sources in this paragraph are available to stakeholder via internet or via published reports.

7.2 Regional and Local LMI Infrastructure

Several regional authorities, such as labourmarket platforms, branche organizations and research and development funds, provincial authorities, regional education centers (ROC) and other parties have taken responsibility to meet the needs of regional LMI.

Table 3: Overview most important resources regional LMI

Subject	Source
Regional LMI	Conjunctuur Enquête Nederland (COEN), CBS
	Regionale rekeningen, CBS
	Regionale kerncijfers MKB, EIM
	Handelsregister, Kamer van Koophandel
	Dataset regional labourmarket information (basisset regionale arbeidsmarktinformatie), UWV WERKbedrijf
	Northern labour market explorations (Noordelijke arbeidsmarktverkenning (CAB)

For the stakeholders in the province of Groningen, the basic set of regional LMI from the UWV WERKbedrijf (Employee insurance agency) is particularly important. These reports contain summaries of supply and demand as well as a comparison between supply and demand at regional level.

Other common used sources are the so called regional accounts by Statistics Netherlands (CBS) and Netherlands Business Survey (COEN). The regional accounts give a quantitative description of the process of economic regions in the Netherlands. The basis for regionalization is the national accounts and COROP format is the most detailed available format.

COEN is a partnership between the Chamber of Commerce (Kamer van Koophandel), the Economic Institute for the Building Industry (EIB), SME Netherlands and VNO-NCW and maps four times a year the main developments and expectations in the Dutch business, via cyclical relevant variables such as production, occupancy, orders, inventory, pricing, profitability and economic environment.

For determining the size of regional employability several business establishment registers are important in the first place. 'LISA' is the collection of regional employment records which per company also presents data on the number of employees including flexible workers.

The employment by industry and region in terms of occupied jobs (specified by jobs, years of employment, amount of workers, etc.) is available in a detailed manner. For the determination of the numbers of jobs, there are several sources, LISA and CBS being the most important ones. The composition of employment by personal characteristics is regionally available. The main sources of insight herein are derived from Statistics Netherlands.

An important source to map the ongoing dynamics at business level is the Chambers of Commerce. All business and, since 2008 also all institutions, are required to register their activity in the Commercial Register of the Chamber of Commerce. Business has to indicate their scope of employment. These registrations make it possible to regionally map the amount of start-ups, new offices, closures, bankruptcies and movements.

In Groningen there is a lot of regional usage of Northern labourmarket explorations (*Noordelijke arbeidsmarktverkenningen*).

These explorations are based on national numbers and try to give a prognosis of future developments on the labourmarket in the province of Groningen. Also, the Northern labourmarket explorations are being used to incorporate more qualitative information in the prognoses, because most of the current LMI is quantitative.

An important source for predicting future developments is the "social statistical database" (SSB), that is combined with other data from Statistics Netherlands, such as the EBB, data about education and also

the general business register (Algemeen bedrijvenregister (ABR)) for business characters. With the use of this information, prognoses are set up for sectorial and sometimes regional employment.

8. Adequacy and impact of the LMI infrastructure

8.1 Awareness of and response to labour market information

The focus of most stakeholders on LMI is on region, they need information that is focused on their region. Most stakeholders use information from the three most northern provinces in the Netherlands. For three stakeholders this is due to the fact that they work for these three provinces (Groningen, Friesland, and Drenthe).

The geographic focus of the desired LMI depends on the tasks of the stakeholders that are interviewed. Most of them were interested in data at a regional or municipal level, to compare with data from other regions or municipalities close by. Lots of municipalities within the province of Groningen are co-operating at the regional level and would like to compare their data.

Furthermore, three stakeholders (representative of the career guidance and the trade union) have a well-shaped relationship with schools and research companies in the region they are asking for information. The career guidance bureau can easily ask the ROCs to give outflow data. These are data that aren't made public.

The school works together with local companies. The school provides education focused on the branch and the companies provide internships and jobs.

8.2 Current use of LMI

The most commonly used (regional) LMI sources are the CBS statistics, the UWV basic sets, DUO charts and the Northern explorations and information about education.

The need for and the usage of LMI differs between users. A director of the social service would like to know where employment is possible, so he knows where he can find vacancies for the people on his unemployment list. The local policy maker would like to know for which vacancies it is hard to find people, and which vacancies are actual available for people who are unemployment so they can enter the labourmarket.

LMI is being used for several reasons depending on the type of organization and activity. We now give an overview of the most important reasons to use LMI per stakeholder:

- For consultancy, motivating, convincing and lobbying (trade union)
- To tune personnel policy and achieve sales targets (recruitment agency)
- As a basis for strategy and decision making in the own organization (all stakeholders)
- To determine short term (less than two years) production size (trade union)
- To be able to conduct business location in the long term (trade union)
- To inform our members about the current labourmarket and developments that are going on (trade union)
- To obtain money for the activities;
- To obtain a national certificate;
- To make a right match between education and the labourmarket (schools)
- To get 30 percent of the total demand on the labourmarket to get a job or to keep their job (politics)

- To make the optimal alignment between supply and demand (regional or local government)

8.3 LMI in the short and long term

The stakeholders working at the recruitment agencies and the employee insurance agency only have a need for short term data. These data should not be older than 6 months.

Schools and municipal policymakers do have the need for long term information, which enables them to actively react to the developments that are going on at the labourmarket. Long term LMI makes it possible for schools to know what kind of jobs are needed at the labourmarket. This long term LMI is also important for businesses, they need to know if there are gaps at the labourmarket and which people will be finishing their education in the next couple of years. The stakeholders are aware that it's very hard to make a complete match between interests of students and the demand on the labourmarket.

Furthermore, stakeholders indicate that long term prognoses do matter but other factors also determine the state of the labourmarket. These are factors such as the economic recession, shrinkage of the regional population, ageing of the population and the increased retirement age.

Next to all this, stakeholders point to the fact that making plans for education or retraining people on the basis of long term prognoses doesn't work. This point has been proven in the last couple of years in the Netherlands by projects in the field of education, ICT and child daycare.

8.4 Users' thoughts on their LMI needs

Most stakeholders think that LMI about the (miss) match between education and labourmarket is very important. Even so, LMI about the future labourmarket (e.g. what will it look like in five years), the size of the labour force, amount of graduate students on different levels are also important to them. What's also important are trends and predictions; for example the prediction how many students of a certain training are needed in 5 years.

8.5 What LMI is missing?

There is a lot of information available in the Netherlands, especially on the national level. All this information is publicly available but not always easy to find. What complicates these matters even more are the used terms and definitions by the different organizations. CBS defines unemployment in a different way as UWV WERKbedrijf does, meaning that different numbers on this topic are circulating. Even more so, throughout Europe the way unemployment is defined differs, so comparison is complicated. One stakeholder said that it's a lot of work to collect the correct information.

All the stakeholders indicate that specific regional information, such as information about the less promising group of people on the labourmarket (Wajong/WSW) is very rare to find. Also the number of college (MBO) students, narrowed down to their major and municipality, is unavailable. These calculations make the stakeholders themselves. There is also a wish to get more information from the tax authority on the way income is distributed in a region or municipality. Furthermore it is important to know how much money is circulating in the local economy.

All data is widely fragmented over several databases, which complicates the matter of searching for LMI. Stakeholders like to select the information about the flow, outflow and failure specifically for their region of interest and this is not possible at the moment.

There are several other factors next to LMI that influence the labourmarket: factors as population (aging), economy (recession), level of education, etc. These characteristics are often regional, and can't be compared by national data. Therefore it's very important to have regional information

The north of the Netherlands covers only 10% of the labourmarket in the Netherlands and has its own characteristics that are different from other parts of the country.

8.6 Resources and sharing of LMI

Four stakeholders have their own research department that analyses LMI and generates it aswell. The employee insurance agency stakeholder has its own databases holding LMI data.

Three stakeholders indicated that they gather a lot of information from informal networks; this is information that isn't publicly available. These are the stakeholders that are representing the career guidance, the school and the trade union. The representative of the school indicated that they have field committees where employers of different sectors participate and where they share a lot of LMI. Three stakeholders indicated that their organization generates (regional) LMI.

The representatives of municipalities hire a research firm to analyze data, they don't have employees that are able to do it their selves.

8.7 Expert Reflection

(Your own Expert Reflection on what the stakeholders have said and what this means.)

Reflection is that we need and use LMI mostly for short term or mid term purposes. This is on a regional level.

There is also definitively a need for reliable long term information from the side of governmental institutions. These policymakers are mainly working on the level of provinces or even country wide.

9. Current and potential use of the EU Skills Panorama in the Netherlands

Most stakeholders did not know the web portal EU Skills Panorama. The majority of them did not see the website and didn't use it. Therefore, it was necessary to explain to them the purpose of the website.

Most stakeholders we interviewed are not involved in European projects. They also think that the European dimension is too wide for the labour market. In a small country like the Netherlands the regional differences in the labour market are very wide. National LMI is not sufficient, let alone European LMI. It's too general and they can't compare it with the local situation.

The vast majority think it an interesting website with important information and topics. Most stakeholders indicated that they will make little or no use of the website. They think the website is better suitable for research and policy at national or European level. The stakeholders we interviewed need regional LMI better.

Positive reactions

In general the positive reactions were related to the layout and the easy way to navigate. The website has a good look and the stakeholders have good feelings about it. When the interviewed stakeholders used the website they were triggered to find more LMI.

Improvements

- Definitions: In the Netherlands we use different definitions for the same terms. The stakeholders assume that this also applies to other European countries. Would people will be able to compare the data, they have to know the definitions.
- Context: In the Netherlands, for example, the retirement age raised from 65 to 67 years. Result was the growing workforce. These are things you should know if you analyze LMI.
- Language: English is a barrier for some stakeholders, it makes the information difficult.
- Dated: the information on the website is too old to use it effectively.

Expectations

Stakeholders indicate that they expect something the same as statline (CBS), a tool in which can be zoomed in at a regional and national level. A database of labour statistics, population statistics, education statistics, etc.

The representative of the school would like to use it to see the trends in Germany and practical examples from Scandinavia.

10. Concluding remarks

The following preliminary conclusions can be drawn from the conversations with regional and local stakeholders:

- LMI is an important part of the activities of the stakeholders;
- A major focus on regional LMI, the labourmarket has different characteristics by region so regional data is needed;
- There is a lot of LMI available, but it's sometimes hard to find and to compare, it takes a lot of time to search and analyze the data;
- Although the stakeholders know and use the different sources for LMI, they also are missing information concerning complex issues of strategic planning.
- Most stakeholders are not concerned with the European data, due to the regional nature of the labourmarket. Therefore, there is little use of the EUSP.

11. Appendix 1: List of Stakeholders

Type organisation	Name organisation	Stakeholder	Role
<i>University of applied sciences</i>	Hanzehogeschool Groningen	Zwannie Slagter	Manager
<i>Employee insurance agency</i>	Werkplein Groningen	Roelof vd Velde	Manager
<i>Trade union</i>	FNV-lokaal	Arnoud Hoogsteen	Policy officer
<i>Municipality</i>	Gemeente Veendam	Klaas Steenhuis	City council member
<i>Recruitment and selection agency</i>	Talenter	Dirk Zandlever	Director
<i>Municipality</i>	gemeente Winsum	Ernst Ottens	Director
<i>Company</i>	Molnycke	Henry Koning	Manager
<i>Branche-organisation</i>	Vno-ncw	Sjoerd Wind	Manager
<i>School/career counselor</i>	Goapubliek	Jeroen Maas	Re-integration advisor
<i>Municipality</i>	Gemeente Opsterland	Sipko van Til	Re-integration advisor
<i>Joint venture (municipalities)</i>	Regio Twente	Paul Mollink	Labour advisor
<i>Municipality</i>	Gemeente Leek	Willy de Boer	Policy officer

12. Appendix 2: (optional) Glossary of Terms

ARLI project: “The Skills Panorama: Achieving Regional and Local Impact”. See “About this project”, above.

EUSP: “EU Skills Panorama”

LMI: Labor market information and intelligence. See “About LMI”, above.

LMI infrastructure: the set of existing LMIs in the geographical area considered.

Long run sight: more than seven years

Medium term sight: two years or more but less than seven years

Short run sight: less than two years

Stakeholder: see “About the stakeholders”, above.