

Executive summary

The COVID-19 pandemic severely impacted the Umbrian economy, and while labour demand has recovered, challenges like digitalisation, tight labour markets, and volatile demand for low-skilled jobs remain.

Against this backdrop, the OECD and the Umbrian regional agency for active labour policies (ARPAL) joined forces to examine the labour and skill demands of the region using innovative big data techniques applied to the analysis of the information collected in online job postings (OJPs). This study also investigates, for the first time in Italy, the alignment between labour and skill demand and the training courses that are available in the Regional Training Catalogue (RTC) managed by ARPAL Umbria and providing information about the educational offerings available in the region.

Results in this study show that labour market demand in Umbria is heterogeneous, with new vacancies being published at all skill levels and that the training options in the RTC are only partly able to align to this varied demand. For instance, as Italian consumers are increasingly turning to online purchases (e-commerce), the logistic sector has experienced significant growth in demand in the region. Although the RTC offers courses for some logistics positions like stock clerks, other highly demanded roles like freight handlers have no specific training options yet. The labour demand for certain food-industry positions, such as waiters, bartenders, and kitchen helpers has also increased, due in part to increased tourism in 2021. While the RTC offers courses for waiters and bartenders, the demand for these workers outpaces the share of training spots in the RTC. In contrast, the RTC focuses heavily on courses for another food industry job: cooks, as 5.2% of all training spots target them, while the number of OJPs is relatively weaker for those professionals.

The RTC also offers many courses for low-skilled occupations such as beauticians and hairdressers, which account for 3.9% and 2.7% of training spots respectively. The labour market demand for these positions – measured by share of OJPs – is much lower than the share of training spots in the RTC. While OJPs may not be able to fully capture the demand for those professionals, the analysis in this report suggests that the current emphasis on these professions in the RTC could be reduced in favour of other occupations showing stronger potential for growth.

Many of the most highly demanded and fastest-growing medium-skill jobs are clerical positions, such as statistical, finance, and insurance clerks; accounting and bookkeeping clerks; secretaries (general); and receptionists (general). The RTC offers many courses for personnel clerks and secretaries but fewer for positions like receptionists or general office clerks. However, it is possible that the skills taught in courses for different types of clerical roles may overlap, making some of the available courses useful to a broad range of clerical jobs.

High-skilled roles, such as business and administration (associate) professionals, are highly present in Umbria's OJPs, partially due to a higher propensity of employers to post these types of vacancies online. The top growing high-skill occupation in Umbria, sales and marketing managers, grew nearly ninefold in terms of OJPs in 2022 with respect to 2018 but targeted courses for managers in that area could be boosted to meet a growing demand.

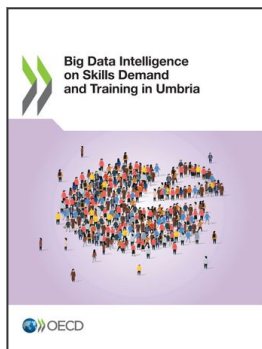
The RTC has a strong focus on specific digital occupations. The RTC's training courses for ICT user support technicians, advertising and marketing professionals, and web technicians make up 10.7% of the total number of available training spots. As growing demand is expected in those roles due to increased digitalisation, ARPAL should closely monitor the alignment of training content with the fast-changing technological landscape and tailor courses to develop skills that are in high-demand.

Transversal skills such as the ability to adapt to change, work in teams, provide customer service, and problem solving are highly demanded in OJPs but rarely mentioned in the course content of the RTC. Conversely, the RTC focuses disproportionately on health and safety in the workplace and resources could be diverted toward providing training in soft and transversal skills.

This report also builds new and tentative indicators to measure the alignment of the content of the courses to the specific demands of the employers in Umbria in a variety of occupations, by mapping the keywords used to describe the training programmes to those used by employers to describe tasks in jobs. Results suggest that, when training is available, the content aligns relatively well with skill demands in a variety of high and medium skill occupations, but that alignment is weaker across low skilled roles.

In an effort to fill some of the gaps, ARPAL Umbria recently launched new training options within the national programme for the Guarantee of Employability of Workers (GOL). Preliminary evidence seems to suggest that the GOL initiative is providing new learning opportunities in occupations that are in high demand and for which the RTC training offer was relatively weak. Currently, however, the number of training courses implemented in this initiative is still limited (as one could expect due to the short-life of the initiative) and the breadth of the new training options could be extended and better targeted to capture an even more varied range of skills and occupations that are in high demand, following also the indications contained in this report and the priorities highlighted in the results.

Finally, it is important to stress that, while the report provides an innovative view on the labour market, which is key to identify policy priorities, certain high-skilled (technical) professions are often overrepresented in online job postings, while professions that require direct human contact are sometimes underrepresented, calling for caution when interpreting the results and continued monitoring of the potential rapid changes in labour demand triggered by technological change, automation and digitalisation.



From:
Big Data Intelligence on Skills Demand and Training in Umbria

Access the complete publication at:
<https://doi.org/10.1787/4b9bbfd6-en>

Please cite this chapter as:

OECD (2023), "Executive summary", in *Big Data Intelligence on Skills Demand and Training in Umbria*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/966f84b0-en>

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