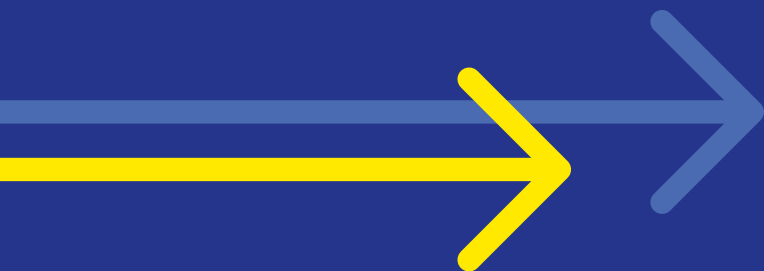


Country fiche

Italy

EURES Report on labour shortages
and surpluses 2023



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Abbreviations

Acronym	Full title
ANPAL	Agenzia Nazionale Politiche Attive Lavoro
GDP	Gross domestic product
INAPP	National Institute for Public Policy Analysis
ISCO-08	International Standard Classification of Occupations 2008
ISTAT	Italian National Institute of Statistics
NCO	EURES National Coordination Office
NRRP	National Recovery and Resilience Plan
JVR	Job vacancy rate



1.0 Labour market imbalances

1.1 Overview

In 2023, the Italian macroeconomic trends aligned with the overall European trends. The growth that had characterised European markets after the pandemic weakened progressively but the European labour market conditions remained favourable. In Italy, this was evident in the rising activity rate, which rebounded after a decline during the COVID-19 pandemic, and by the increasing number of individuals in employment, which in 2023 was higher than the pre-pandemic level. The employment rate rose to 61.5% in 2023Q3, +0.2 percentage points compared to 2023Q2, and +2.1 compared to the previous year (2022Q3). The unemployment rate remained stable at 7.6%, while the inactivity rate for individuals aged 15-64 dropped to 33.3% (-0.2 percentage points compared to 2023Q2, and -4.1 percentage points compared to 2022Q3). In the same period, the job growth continued, albeit, at a slower pace compared with the earlier quarter and the previous year (ISTAT, 2024). Companies' projected hires in 2023 exceeded 5.5 million (22% of the labour force in the country in the same year), approximately one million more than pre-pandemic levels (Unioncamere - ANPAL Excelsior Information System,¹ 2023a).

The Italian labour market is faced by several challenges. The labour force shrank by about 600 000 people (-2.4%) over the last four years. This trend is linked to lower numbers of new entrants into the labour market compared to those exiting due to retirement (Excelsior, 2023a). Further, recent evidence indicates that throughout the pandemic, women's labour market participation, particularly of those with young children, significantly decreased, and they were also less likely to be hired in new recruitment (ISTAT,

2021). Indeed, female participation in the labour market keeps being one of the lowest in Europe, with the female employment rate at 7.7%, against 6% at the EU level (Eurostat, n.d.). Finally, recent ISTAT data reveals a significant increase in the percentage of Italians relocating abroad (over 50% over the past 20 years), particularly among highly qualified individuals aged 18-49.² However, the decline of the labour force is somewhat offset by positive dynamics of inflows of migrant and mobile workers. Census data indicates that 5.1 million foreigners are residing in Italy, a 2.2% increase in 2022 compared to 2021, representing 8.7% of the total resident population. The majority of workers relocating to Italy originate from Eastern Europe, e.g., Romania, and North Africa, e.g., Morocco (ISTAT, 2023).

The above phenomena creates a seemingly paradoxical situation: despite broadly positive macroeconomic trends and high level of unemployment, the labour market is showing signs of scarcity on the supply side, as highlighted by the data collected by the Italian National Coordination Office (NCO) (Annex 1). Overall, 37 main shortage occupations in the industrial and service sectors³ were identified in the 2023 edition of the EURES Report on labour shortages and surpluses. Among these, the broad occupational group technicians and associate professionals dominate with eight shortage occupations, followed by service and sales workers and craft occupational groups, each with seven shortage occupations. The majority of these identified shortage occupations correspond to a qualification level of 2 according to the ISCO '08 classification (equivalent to a secondary level of education), while only a small subset of occupations requires higher qualification levels;

1 - Hereafter Excelsior 2023a.

2 - No official survey officially investigates the causes of emigration. Italy has one of the highest youth unemployment rates (according to Eurostat, in 2023, 22.7% against 14.5% in the EU), which also represents a challenge in the Italian labour market. Better salaries and more stable working conditions are usually mentioned as main causes of emigration (Bacchi, 2022).

3 - No surplus occupations were identified as data are taken from Unioncamere - ANPAL Excelsior Information System (Forecast July 2023, which does not provide information on surplus occupations).

these include supply, distribution, and related managers; industrial and production engineers; vocational education teachers; advertising and marketing professionals and software and applications developers and analysts not elsewhere classified.

The shortages in Italy are predominantly labour shortages, with only three occupations (i.e., commercial sales representatives, construction supervisors, and trade brokers) classified as skill shortages by the Italian NCO. This situation aligns with the labour market trends described above.

The labour shortages are also reflected in the trend of the job vacancy rate (JVR), which has been increasing since the pandemic and has surpassed pre-pandemic levels. The rate is consistently above 1% in all economic sectors, suggesting labour shortages are widespread across the economy. However, the JVR is notably high in two sectors, construction and accommodation and food services, at 3.4% and 3.7% respectively in 2022 (Eurostat, 2023). Based on the 2023 Unioncamere - ANPAL Excelsior annual survey,⁴ the two sectors foresee the highest number of anticipated job openings. Notably, many of the identified shortage occupations belong to the two sectors (foremost the construction one) (Excelsior, 2023a).

Jobs in construction and, to a somewhat lesser extent, in accommodation and food services, are often physically demanding, with long hours and sometimes low pay, making them less attractive to workers. It is important to emphasise that the contractual forms also influence these figures in sectors characterised by a high incidence of fixed-term contracts or frequent interruptions in employment relationships (Excelsior, 2023a). Moreover, the notable surge in labour demand within the accommodation and food services sector can be traced back to its positive rebound following 2021. In 2022, this sector exhibited a greater increase in added value in comparison to all others, primarily fuelled by the lifting of COVID-19 restrictions and the robust revival of both domestic and international tourism flows (INAPP, 2023a). The sector's gross hourly wage is 20% below the Italian average in all sectors, which could contribute to its poor attractiveness and consequent labour shortages (Istat data, 2023).

The upward trend of the JVR also mirrors another shortage occupation in Italy, namely other artistic and cultural associate professionals. Specifically, the JVR in the arts, entertainment, and recreation sector saw a notable increase of 0.9 percentage points from the previous year (peaking at 2.7% in 2022). It should be noted that Italy stands out among the four countries designating this occupation as

a shortage, whereas most art-related professions are categorised as surplus by other EURES countries. This can be attributed to several interconnected (and structural) factors. Low wages, atypical working patterns, and irregular income - despite the high level of education, skill, and training often required for these positions - have led to the weakening of workers' bargaining power, forcing them to accept a higher level of precariousness and (even) informal work. Another issue is the restricted access, or even no access at all, to social protection schemes such as unemployment benefits, sick leave, and maternity leave, making these careers less appealing. In this framework, the pandemic has significantly impacted the sector and likely led individuals to move to other sectors or abroad in search of better working conditions. (INAPP, 2023b, and Martinelli, 2021).

Interestingly, Italy includes six of the most widespread surpluses identified by the EURES 2023 report as shortages.⁵ For advertising and marketing professionals and commercial sales representatives, the discrepancy may stem from cross-country differences in economic structure and the pace of digital transformation. On the one hand, Italy's economy is heavily reliant on SMEs and sectors like luxury goods, fashion, food and tourism, likely resulting in higher demand for these occupations compared to other countries. On the other hand, digital transformation across many sectors has led to increased investments in e-commerce and online marketing, consequently driving up the demand for such profiles (Excelsior, 2023a).

Findings show that difficulties in recruiting the right candidates are transversal to different economic sectors and occupations. This is confirmed by the latest Unioncamere - ANPAL annual report (Excelsior 2023a) on the demand for professions and training in Italian companies which highlights that the share of job vacancies expected to be 'hard to fill' by companies has significantly increased, reaching 46% in 2023 (compared to 26% before the pandemic and 40% in 2022). In absolute terms, the number of 'hard to fill' job vacancies has more than doubled, rising from about 1.2 million before the pandemic to approximately 2.5 million in 2023. The main challenge is the lack of available candidates, followed by the adequacy of available jobseekers in the market compared to companies' needs (Excelsior, 2023a).

Despite these challenges being common to all economic sectors, construction and metallurgy face more pronounced difficulties (where nearly 58% of planned vacancies are considered 'hard to fill'), followed by the furniture industry (57%), and the mechanical sector (56%).

4 - The Unioncamere - ANPAL Excelsior Information System provides annual forecast data on labour market trends and the professional needs of companies, estimating the share of vacancies that are considered 'hard to fill'. More information can be found at: <https://excelsior.unioncamere.net/>

5 - Advertising and marketing professionals; beauticians and related workers; commercial sales representatives; manufacturing labourers not elsewhere classified; messengers, package deliverers and luggage porters; secretaries (general).

In services, the percentages are higher in automobile trade and repair, ICT, and healthcare services (57%, 53%, and 51%, respectively).

On the other hand, the most difficult-to-find professional roles are skilled workers and qualified professionals in activities and services. Specifically, among the top-30 occupations identified as the most difficult to find in 2023, 12 belong to craft workers primarily needed in the construction sector (e.g., welders, plasterers, upholsterers, electricians in civil construction, plumbers) and the industrial sector (e.g., mechanics and maintenance workers, equipment operators, iron workers).

Hiring difficulties are also experienced in the healthcare sector, e.g., general practitioners and nursing and mid-wifery health professions (Excelsior, 2023a). Despite this, health-related professions seem to be somewhat under-represented in the data collected from the NCO. However, when comparing the number of workers in the healthcare sector with the population, it becomes clear that Italy is facing numerous shortages. When comparing national data with the EU averages, data shows that the healthcare workforce has an adequate number of doctors, but there is a scarcity of nurses. Furthermore, the number of specific occupations – primarily general practitioners – falls below the EU average and is not evenly distributed across the territory. General practitioners are particularly lacking in low-population density areas or regions in the south of Italy. This raises several concerns regarding future needs for such occupations. Given the ageing population, there will be a growing demand for healthcare services over time. Further, the increasing demand will coincide with a significant increase in retirements within the healthcare sector, which is characterised by a high number of individuals aged 50 and above, partly due to recent hiring freezes^{6 7} (Agenas, 2022; SMIVEZ, 2023).

The overall increasing recruitment difficulty and widespread shortage of labour are also matched by the number of authorised work permits, which has steadily grown since 2019 (with the sole exception of 2020 due to the pandemic). Compared to 2019, the number of permits authorised in 2021 increased by over 100%, and in 2022, it further increased by 300%. For the triennium 2023-2025, a total of 452 000 third-country nationals (around 2% of the total workforce population in 2023) will be admitted to Italy for seasonal and non-seasonal subordinate and autonomous work. Despite the further increase in the number of permits allowed in 2023, companies submitted 4.4 times more applications than the available permits, highlighting the severity of the mismatch. Among the professions that will be eligible for entry are electricians, plumbers, bus drivers, and workers in family and socio-medical care. The sectors of road transport, construction, tourism/hotels, mechanics, telecommunications, food, and shipbuilding are also mentioned. In the area of seasonal employment opportunities, the agricultural and tourism/hotels sectors are highlighted (Ortensi, 2023; Gagliardi et al., 2023).

Besides general trends in the labour market, the green transition plays a role in shaping the demand for labour and the challenges in workforce recruitment. According to Unioncamere - ANPAL, Excelsior Information System 2023, companies generally face greater difficulties in sourcing 'green jobs' compared to other occupations. Among various sectors, construction exhibits values above the average for entries requiring green skills, difficulties in recruitment are evident for 53.9% of them. Noteworthy among industrial sectors with significant shares of green jobs are the branches of machinery, equipment, and transportation manufacturing (82.8%) and metallurgical and metal product industries (82%) (Unioncamere – ANPAL Excelsior Information System, 2022).⁸

6 - It is often the case that, due to austerity policies, the care sector often experiences budget cuts, leading to recruitment halts. More information on this can be found at: https://www.quotidianosanita.it/governo-e-parlamento/articolo.php?articolo_id=117650 and <https://temi.camera.it/leg18/temi/misure-per-il-rafforzamento-del-personale-sanitario-nell-emergenza-coronavirus.html>

7 - Italy also suffers from serious investment gaps in social infrastructure, especially in the south. See for example: https://www.cdp.it/resources/cms/documents/CDP_SOCIAL_INFRASTRUCTURE_ENG.pdf

8 - Hereafter (Excelsior, 2022).

1.2 Expected future developments

The forecast for 2023-2027 by Unioncamere - ANPAL, Excelsior Information System (2023b)⁹ provides insights into planned job openings and average annual demand rates.¹⁰ According to the forecast, by 2027, managerial, professional, and technical roles will represent a significant portion of total planned vacancies (around 40%).¹¹ Among high-skilled occupations, the highest average annual demand rate is anticipated for market relations technicians, and technical occupations in the health sector, e.g., nurses and physiotherapists. Technical occupations in public and personal services are also expected to be in high demand (Excelsior, 2023b).

Over the same period, the demand for clerical workers and service and sales workers will cover about one-third of the total employment needs. Among these, receptionists and customer information clerks display the highest average annual demand rate. The qualified professions in the hospitality and catering sectors and secretarial and office clerks are prominent. The estimated needs for specialised labourers and plant operators are close to 17% of the total; out of these, craftsmen and specialised workers in the arts and entertainment sector (e.g., stagehands, props) show a high average annual demand rate (although the planned job openings are modest in absolute terms). Strong growth is expected for earth moving, lifting and material handling machine operators, especially in the construction and infrastructure sector, followed by craftsmen and skilled workers in the mining industry and building maintenance, construction and building maintenance workers, and construction finishing workers. Elementary occupations only account for 10% of the total future demand (Excelsior, 2023b).

Unioncamere and ANPAL identified critical occupations by linking the average annual demand rate with the share of hard-to-fill vacancies in 2022 (see Annex 2).¹² Many of these are in the care sector (e.g., doctors, nurses, physiotherapists, and qualified professionals in health and social services). Other critical occupations belong to sectors that will receive significant funding to support the digital and green transition (e.g., specialists in mathematical and computer sciences, ICT technicians, engineers and technicians in the engineering field, specialised workers in construction, and workers in the catering industry) (Excelsior, 2023b).

Cedefop (2023) projects skill demands up to 2035, revealing interesting trends in Italy's labour market. Accommodation and food service activities, and human health and social work activities emerge as the most rapidly expanding sectors. The report also identifies two factors that will drive occupational change and labour demand. Firstly, increasing sector specialisations are expected to impact the employment composition, which ultimately will lead to a rise in roles such as professionals, managers, and associate professionals. This shift will also extend to occupations supporting production processes, including building and related trade workers and assemblers. Secondly, the rise of automation and digitisation is forecasted to significantly increase the demand for assemblers and workers in building and related trades. By 2035, these occupations are expected to experience substantial growth. However, the report underscores that the highest skills mismatch by 2035 will be experienced by professional occupations. This emphasises the need for targeted interventions and policy initiatives to bridge the gap between evolving skill demands and the available workforce (Cedefop, 2023).

9 - Hereafter (Excelsior 2023b).

10 - The rate refers to an estimate of the number of staff needed to ensure the proper functioning of activities and services. This rate considers variables such as economic growth, retirements, and mortality.

11 - It is to be noted that the weight of professionals and technicians varies considerably between the private (32%) and the public sector (65%).

12 - Occupations are defined as 'critical' when, in 2022, they had a share of 'hard-to-fill' vacancies above 40%, and are expected to be in demand intensively over the next five years (i.e., have an annual demand rate above 3.2%).



2.0 The construction sector

The construction sector constitutes a significant portion of national investment, representing roughly half of the nation's gross fixed capital investments and contributing the most to GDP growth in 2022. This upswing can be attributed to several factors. Firstly, government tax incentives have stimulated activity within the industry, encouraging hiring and investment. Additionally, the allocation of a considerable share of NRRP funds towards green transition further contributed to the expansion in the sector (Confartigianato, 2023; Research Randstad, 2023). Investment expenditure has somewhat declined, owing to the higher cost of financing (i.e., an increase in interest rates) and the end of public incentives (Banca d'Italia, 2024).

Analysis of employment trends within the sector since 2019 shows a marked increase following a period of stagnation. Input indicators across construction, real estate and professional services – which are sectors directly influenced by construction investment demand - have seen significant growth. Between 2019 and 2022, these sectors collectively added 363 000 jobs, marking a robust 7.9% increase, while the rest of the economy experienced a downturn, losing 622 000 jobs (-3.2%) (Confartigianato, 2023). Despite Italy's underperformance compared to the eurozone across various sectors, the Italian construction industry has stood out. This trend is reinforced by data on planned job openings in 2023. Moreover, there has been a noticeable upswing in labour demand within sectors closely tied to construction, such as the wood industry. However, certain industries, notably those with high energy-intensive production processes such as the processing of non-metallic minerals and metallurgy, have faced challenges in expanding their workforces. This situation has contributed to the industry's struggle to keep up with the rapid pace of demand growth, highlighting the complexities and constraints within the broader economic landscape (Gagliardi et al., 2022; Excelsior, 2023a). This is also reflected by the evolution of the JVR for the sector between 2016 and 2022, which provides insights into the labour market dynamics of the industry. In 2016, the JVR suggested a relatively balanced, or slightly tight, labour market with a JVR of 0.9%. However,

the rate progressively increased over the years, peaking in 2022, when the JVR increased to 3%, indicating potential challenges for employers in filling positions (Eurostat, 2023).

The construction sector faces challenges in keeping pace with demand as shown by the many occupations in the sector identified as experiencing a shortage by the Italian NCO and reported in the EURES 2023 report. Looking at the Unioncamere – ANPAL report (Excelsior, 2023a), it is evident that filling vacancies in the construction sector poses challenges, primarily due to a scarcity of applications and a lack of skills that align with the sector's requirements. In this context, recruitment difficulties span across occupations with varying educational levels, ranging from civil engineers to specialised workers in industrial sectors along the construction supply chain. The report highlights a significant mismatch increase, with recruitment challenges reported for roles such as masons, plasterers, carpenters, and joiners, electricians, window and door installers, pavers, nearly doubling between 2019 and 2023 (Gagliardi et al., 2022; and Excelsior, 2023a).

The lack of candidates can be attributed to several factors, including limited approval of new technologies, widespread fragmentation of work, and extensive subcontracting practices in the industry. Additionally, social partners report that, despite being a significant driver of the post-COVID-19 recovery, there has been no growth in the size of companies within the construction sector. In 2022, a significant 40% of construction firms operated without a single permanent employee. These conditions contribute to the sector's poor attractiveness, often physically demanding and risky,¹³ even for those occupying qualified engineering roles. The significant presence of workers from third countries (i.e., migrant workers) in the sector further exacerbates such challenges, contributing to underemployment and low earnings. Low wages and limited career prospects, alongside the demanding nature of the tasks, contribute to the sector's unattractiveness to young individuals or workers transitioning from other manufacturing sectors, thus contributing to explaining the disparity between the high demand for various professional profiles within the sector and the limited supply of qualified candidates (Research Randstad, 2023; Fillea, 2022).

13 - For data on accidents in the sector see: <https://www.inail.it/cs/internet/comunicazione/news-ed-eventi/news/news-dati-inail-costruzioni-2023.html>



3.0 Conclusion

The Italian labour market shows positive signs spurred by a modest economic recovery post-COVID-19, especially supported by substantial public investments in the construction sector. Nevertheless, persistent challenges have long defined the Italian landscape, including a low female labour force participation and a high unemployment rate. Demographic shifts, marked by a shrinking population and the consequent contraction of the available workforce, pose additional challenges in the labour market.

Recently, the Italian economy experienced many labour shortages. The low participation of young people in the workforce suggests that labour shortages will increase as more of the population nears retirement age. This trend is particularly acute in the healthcare sector, which already struggles to attract workers and will be characterised by escalating demand due to the ageing population. Still, labour shortages characterise all economic sectors, with companies noticing difficulties in recruiting workers at different levels. The severity of the shortages in the country is further evidenced by the increasing number of available works permits for third-country nationals, which remains insufficient considering the higher number of requests received from companies.

Roles that demand green skills are particularly challenging to fill, posing a threat to green investments, including those funded through initiatives such as the NRRP. Notably, the construction sector, a key player in the green transition, receives substantial funding, yet struggles with recruitment due to its lack of attractiveness.

The situation in the construction sector illustrates the multifaceted nature of labour shortages, necessitating a comprehensive approach. While increased migration may mitigate some imbalances, addressing these phenomena requires tailored strategies to effectively tackle sector- and occupation-specific disparities, including improvements in working conditions and wages for both domestic and migrant workers. A sustainable strategy involves creating a more inclusive labour market, tapping into underutilised domestic human resources, particularly women who are significantly underrepresented. Furthermore, targeted investments in education and training aligned with high-demand sectors are crucial for long-term success.

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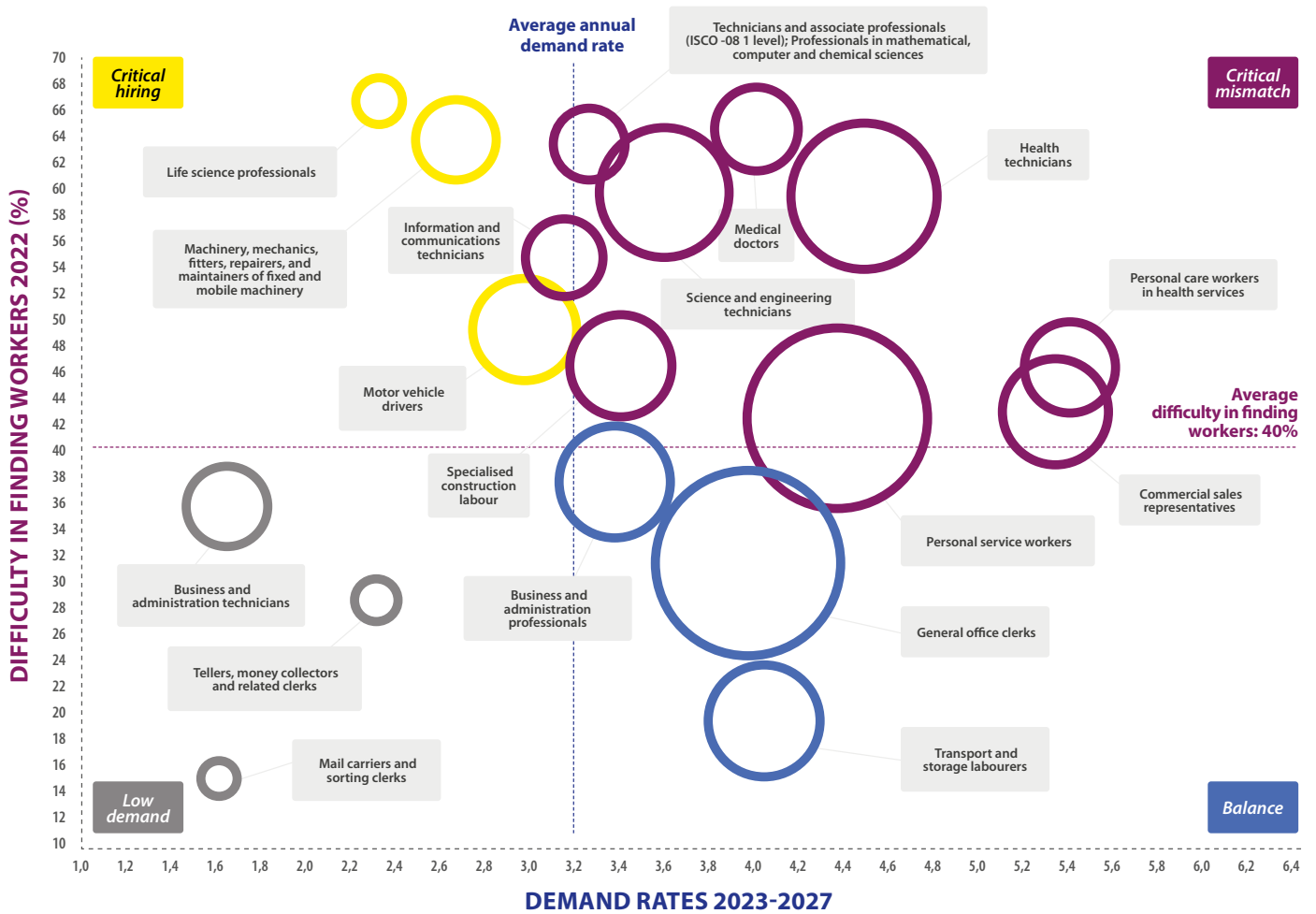
Annex 1: List of labour market imbalances (Italy)

ISCO code	Shortage occupation	Type of
3313	Accounting associate professionals	Labour
2431	Advertising and marketing professionals	Labour
7512	Bakers, pastry-cooks and confectionery makers	Labour
5142	Beauticians and related workers	Labour
7411	Building and related electricians	Labour
5153	Building caretakers	Labour
4229	Client information workers not elsewhere classified	Labour
3322	Commercial sales representatives	Skill
3513	Computer network and systems technicians	Labour
3123	Construction supervisors	Skill
9332	Drivers of animal-drawn vehicles and machinery	Labour
8342	Earthmoving and related plant operators	Labour
7412	Electrical mechanics and fitters	Labour
8160	Food and related products machine operators	Labour
5246	Food service counter attendants	Labour
5321	Health care assistants	Labour
7111	House builders	Labour
2141	Industrial and production engineers	Labour
9329	Manufacturing labourers not elsewhere classified	Labour

ISCO code	Shortage occupation	Type of
8211	Mechanical machinery assemblers	Labour
3211	Medical imaging and therapeutic equipment technicians	Labour
9621	Messengers, package deliverers and luggage porters	Labour
7223	Metal working machine tool setters and operators	Labour
7231	Motor vehicle mechanics and repairers	Labour
3435	Other artistic and cultural associate professionals	Labour
9129	Other cleaning workers	Labour
8183	Packing, bottling and labelling machine operators	Labour
5169	Personal services workers not elsewhere classified	Labour
3119	Physical and engineering science technicians not elsewhere classified	Labour
5249	Sales workers not elsewhere classified	Labour
4120	Secretaries (general)	Labour
5414	Security guards	Labour
2519	Software and applications developers and analysts not elsewhere classified	Labour
1324	Supply, distribution and related managers	Labour
3324	Trade brokers	Skills
2320	Vocational education teachers	Labour
7212	Welders and flame cutters	Labour

Annex 2: Critical occupations

Figure 1: Labour demand for the next five years and difficulties in filling occupations



Note: The size of the bubble represents the projected need for workers in the 2023-2027 period.

Source: Unioncamere – ANPAL Excelsior Information System, 2023b, p. 38



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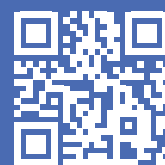
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