



PES to PES Dialogue

The European Commission Mutual Learning Programme for Public Employment Services

DG Employment, Social Affairs and Inclusion

Peer Review “Blended service delivery for jobseekers”

Peer Review Comparative Paper

July 2014

This publication is commissioned by the European Community Programme for Employment and Social Solidarity (2007-2013).

This programme is implemented by the European Commission. It was established to financially support the implementation of the objectives of the European Union in the employment, social affairs and equal opportunities area, and thereby contribute to the achievement of the EU2020 goals in these fields.

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In collaboration with ICF and the Budapest Institute

Please cite this publication as: European Commission (2014), Blended service delivery for jobseekers, Peer Review Comparative Paper, Brussels, Author: Willem Pieterse

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Executive Summary

This report contains a (summarised) comparison of the blended service delivery strategies and implementations of different PES organisations. The study is a follow-up on the Peer Review conducted in 2011, which focused on multi-channel management. The guiding questions for the comparisons are the following:

- To what extent can jobseekers be served online (via self-help and interactive tools) and what are the key considerations for PES?
- What are innovative developments in digitalisation and blended service delivery (and what are implications for the role of face-to-face counselling /monitoring)?
- How do PES measure the performance of different channels and blended service delivery?
- How do PES manage the changes on resources and staff in the context of increased digitalisation of services?

In terms of strategy, we see that most PES are still focusing heavily on the development of their electronic services. We also see that the PES converge in their strategy, with many PES seeing the online channel as their primary and/or preferred channel. However, they vary in the ways they implement their strategy and the ways the other channels play a role in this. Broadly three groups of PES organisations exist:

1. PES with one primary channel, others serve as support and/or back-up
2. Channels are seen as supplements, where some channels are used for some services and others for other services
3. All channels are open, with no clear differentiation between the different channels

Blended service delivery is in this context seen in two different ways. In the first, channels serve as support or back-up for one another (e.g. a counsellor and client look at the client's online profile at the same time). In the second, channels are blended generally, indicating that clients can choose whichever channel they desire to obtain a service.

Countries who pursue the most ambitious strategy in pushing their clients towards the online channels are showing that it is possible to serve most clients online. This strategy works due to high levels of internet penetration and a population familiar with using electronic (government) services. However, all PES organisations that follow this strategy do acknowledge that not all clients can and will be served using online services. Most PES are using fall back mechanisms to serve the people who cannot be served online via traditional means. This applies to a) the parts of the population that are not Internet savvy enough and b) those services that, by nature, are more complicated to digitalise (most notably counselling).

Most PES have made progress in digitalisation since the previous review in 2011. Most recognise that data-heavy services (such as registration) are best offered online. The most important service that is not yet digitalised is counselling (including coaching and mentoring). Blended services are mostly being deployed in support situations (e.g. a counsellor helping with an online form) or situations where part of a service (e.g. identification in person) has been completed via a certain channel.

The biggest room for improvement in general for PES organisations relates to the third guiding question; measurement of success. While many PES organisations monitor the use of (some of) their services within the certain channels, and most do conduct surveys, none have comprehensive approaches that allow them to evaluate the performance of all channels. Methods like Customer Journey Mapping are still in their

infancy and none of the organisations mention the use of advanced and predictive modelling based on their collected data. While the biggest reported challenge pertains to the creation of an evaluation across all channels, PES organisations also seem to struggle with on the one hand the bigger picture (what does performance mean?) and the other hand operational issues (what to measure, why and when?).

1. Introduction

The European Commission's PES to PES Dialogue programme focusses on mutual learning between PES to support them in continuously increasing the service delivery capacity and effectiveness. The Peer Review forms part of this programme and focusses on Blended Service Delivery for Jobseekers. The guiding questions for the Peer Review are as follows:

- To what extent can jobseekers be served online (via self-help and interactive tools) and what are the key considerations for PES?
- What are innovative developments in digitalisation and blended service delivery (and what are implications for the role of face-to-face counselling /monitoring)?
- How do PES measure the performance of different channels and blended service delivery?
- How do PES manage the changes on resources and staff in the context of increased digitalisation of services?

In many ways this paper is a succession of the PES to PES review on multi-channelling conducted in 2011. Not only is the topic (roughly) the same, but many of the same PES organisations participate in both the 2011 and 2014 review, allowing for an analysis of the progress made. The key difference is that this Peer Review has a more in depth focus on one important area of (multi-channel) service delivery; blended service delivery.

The comparison in this paper is based on a set of data provided by the various PES organisations involved. It is intended to provide a general overview and lessons to be learned. It is by no means intended to evaluate or judge the PES' service delivery strategies.

This paper is organised in 4 parts. In section 2 we focus on developments in digitalisation and blended service delivery. In section 3 we discuss the ways in which PES evaluate and monitor the success of their service delivery. In the fourth section we focus on the context (e.g. labour market developments) in which current modes of service delivery take place. In the fifth and final section of this paper we draw a number of general conclusions about the state of the art of blended service delivery in PES organisations as well as some key differences between the different PES organisations. First, however, we discuss the meaning of the concept 'blended service delivery' and connect this to the broader topic of multi-channel management.

1.1 What is blended service delivery?

Blended service delivery can focus on many different aspects of the service delivery process. Most notably it can refer to:

- Blending services (e.g. one action is re-used in different processes).
- Blending modes of delivery (e.g. having a combination of internal and outsourced service delivery (i.e. external call centres)).
- Blending service channels (e.g. using different channels for different steps in the service delivery process).

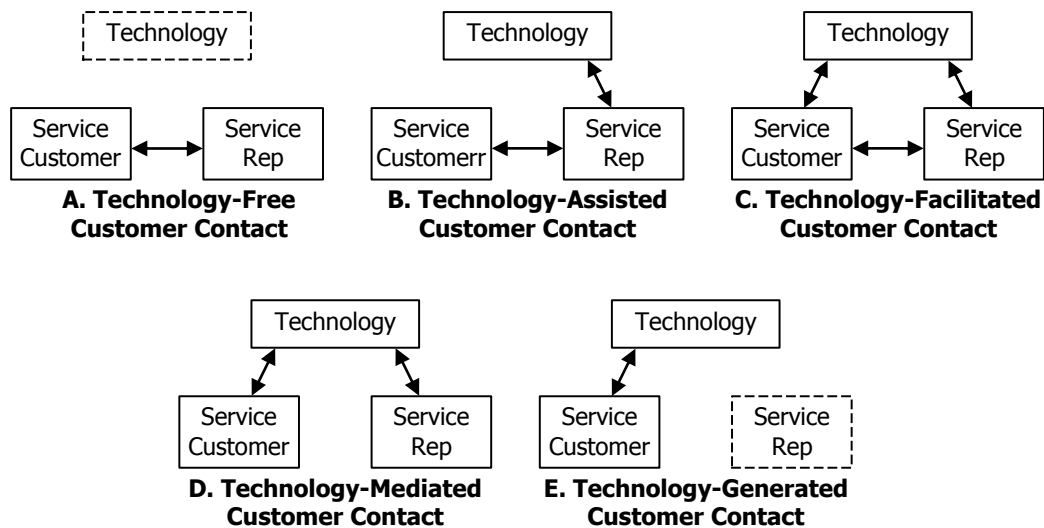
Channels can be blended in three ways:

- a. Different channels between services (i.e. offer one service via one channel and another service via another channel)
- b. Different channels within one service (i.e. one step in the process is online and another is offline)

- c. Simultaneous use of multiple channels within one service (i.e. a call centre agent supports a job seeker who is filling out a form online).

The latter form is also referred to as technology-facilitated customer contact. This is typically seen as one of the forms of customer contact that lead to a purely technology mediated contact. Figure 1 below illustrates the different forms of customer contact.

Figure 1: Archetypes of customer contact (Kellog & Chase, 1995)



Different PES make use of these different types of blended services. One prominent example is from the Netherlands:

The **telephone service** forms a bridge between the local office and the internet: frequently asked questions are handled via the internet, first line questions (general questions) are handled by the call centre and second line questions (highly personalised questions) are handled by the regional/local office.

There are other examples: the Swedish PES uses **co-browsing** where the call-centre agent sees the same website as the client. In addition, the call-centre agent could call the customer via the phone and still be connected via co-browsing. This also works the other way around. In this case, high levels of coordination are required between the two channels, ensuring the same content. Another example of the use of different channels within one service can be found within VDAB, where in **'flexitraining modules'** part of the training happens online and part happens live in classrooms. The use of Skype by the Estonian PES is a clear example of Technology-Mediated Customer Contact. The key challenge here is to ensure the underlying IT infrastructure functions well and that call-centre agents have undergone the necessary cultural and skill changes.

Main conclusion

Blended service delivery is not one unified concept. Within a multi-channel service strategy it can take many different forms. Each different form has different levels of technological involvement and has different requirements.

1.2 Relationship to multi-channel management

Blended service delivery assumes that multiple channels are being used. This implies that blended service delivery is always part of a multi-channel strategy (the more specific focus of the 2011 Peer Review). As in the 2011 paper, we use the following definition of Multi-channel management (MCM):

"Multi-channel Management is the effective and efficient deployment of channels for the communication, interaction, transaction with and/or distribution of products/services to the client" (Teerling et al., 2007). Carefully managing the available channels for the interaction with certain client groups can impact the effectiveness of service-delivery, as well as the efficiency of the service-delivery process. Ideally, the Multi-channel strategy is therefore based on a carefully described overall (service) mission and strategy. The differences in strategies may translate into different definitions and levels of integration and functions of the available channels.

Regarding the MCM strategy being pursued, we follow the distinction made by Pieterse and Van Dijk (2006) in four different **MCM strategies**:

- Parallel positioning: Channels are positioned next to each other. Citizens are free to choose their channels and services are available through each channel.
- Replacement positioning: Channels can replace each other. The assumption is that channels can be superior or inferior to each other. Customers would prefer to use the best channel and therefore one channel would replace another (immediately or over time).
- Supplemental positioning: Channels have supplemental values; each channel has its own characteristics that make it suitable for certain types of services or client groups. Therefore, governments should offer services via the best suited channels.
- Integrated positioning: All channels are integrated in the entire service delivery process. This means that all services are offered via all channels, but that strengths and weaknesses of channels are considered in their design. Citizens are guided to the 'best' channels and channels seamlessly refer to each other.

The focus hereby is on **integrated** multi-channel management, which we can define as follows:

"Integrated Multi-channel Management is the effective and efficient deployment of multiple service channels within one public service delivery process or the use of different channels for different service delivery processes, whereby the different channels relate to each other, for the communication, interaction, transaction with and/or distribution of products/services to the client".

While many perceive integrated multi-channel management as the most cost-efficient type of channel management (while still being able to maintain high client satisfaction), we noted in 2011 that most PES organisations did not have an integrated channel strategy. The 2011 analysis showed that many **PES** organisations have **similar goals** (customer satisfaction & cost efficiency), but differ in terms of the strategies followed to reach these goals. No organisation had a true integrated strategy. Many focused on keeping all channels open and some on the supplemental value of different channels. In general, these strategies make it difficult to reach the goals and moreover many strategies:

- Lacked concrete targets that were measurable and steps to reach the goals
- Too strongly focused on channels or services instead of all (organisational) aspects
- Lacked an evaluation strategy that allowed to measure and benchmark progress

In section 2, below, we will discuss the progress that has been made (since 2011) and current (2014) strategies of the different PES organisations.

2. PES developments in digitalisation and blended service delivery

In 2011, one of the main conclusions was that there was a large variety in the MCM strategies followed by the different PES organisations. Some organisations already focused heavily on the **online channel** (e.g. the Netherlands), whereas others barely had an online presence (e.g. Bulgaria, Romania). Most organisations saw an important role for face to face services, leading to several PES seeing the different channels as equals.

In 2014 the different strategies seem to converge. Most countries have witnessed an **increase** in the use of electronic services over the past few years, coupled with a decrease in the use of other channels. **Budget** issues in many cases add to the increased focus on the more cost-efficient channels. This overall trend is probably best exemplified by the Polish PES.

"The changes of unemployed population characteristics enabled PES to offer digital services. More and more citizens have e-skills and wider access to the Internet. What is more, PES clients are quite interested in using e-services and some of them prefer on-line instead of face-to-face contact."

The table below summarises the various impetus for change. It highlights that external influences (most notably the increase in unemployment) are the most important drivers for change. This is followed by best practices from other PES organisations. Many of these best practices highlight successes achieved through delivering electronic services.

Table 1: Inputs for change in service delivery

	AU	BE	DE	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Evidence for Change														
Societal / External Influences¹		X	X ²	X	X	X	X	X		X		X	X	X
Best Practices	X				X	X	X	X	X		X	X		
Customer Surveys	X		X			X								X
Benchmarking					X	X						X		X
Focus Groups	X													
Cost Analyses		X								X				
Geography (distances)						X								

1 Including legal changes or other political influences

2 In this case it is mostly societal changes, factors such as unemployment are not applicable in Germany.

High Workload	X	X	X	X	X
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This has led to some countries explicitly turning electronic channels into their primary channels, whereas other countries have a softer approach; they recognise the prominence of the electronic channels but still see the value of the other channels. However, all PES organisations move forward with the development of **electronic services** and it appears that in most cases the PES prefer their clients to use the electronic (self) service channels and encourage their users to use these channels. Customer surveys and research from the German PES illustrate this very well:

- *"The importance and spread of the internet and mobile devices is constantly increasing.*
- *In consequence, the internet is increasingly accepted as an important channel for public services.*
- *On the part of customers, there is a growing demand for digital access – alternative or additional to traditional channels.*
- *The expansion and development of digital access channels can lead to more efficient service delivery."*

The main difference in 2014 lies in the **nuances** and the way the 'other' channels are being positioned. Here we can roughly distinguish **four approaches**, with the first two being the most prominent:

- Support for the primary channel (within service blend). Channels such as the telephone primarily serve as support for the primary channel (e.g. when technical problems arise) or to help clients use the primary channel. In this scenario, the phone is blended with online services.
- Equal to the primary channel (between service blend). Some PES organisations continue to recognise the importance of choice for their clients and treat all channels as equals (more or less).
- Back-up for the primary channel. Channels such as face-to-face remain open, but only for situations in which the client is unable to use the primary channel.
- Specific purposes alongside primary channel. In some cases the primary channels is not the best suited channel (e.g. counselling). In these cases the client will be directed towards the channel best suited for the task.

Based on these roles, roughly three broad groups of strategies emerge.

2.1 Current strategies; towards conversion

2.1.1 Strategic choice 1: one primary channel, others serve as support and/or back-up

In this strategy both changes in demand and other influences (e.g. austerity measures) led to a strong focus on one channel (the online channel). In this strategy clients are being **guided** to the **online** channel to complete most of their services. The other channels serve two purposes: a) support for the primary channel (e.g. a means to guide people to the online channel) and b) back-up channel (e.g. serving as a net for those clients who cannot do their services online). This can be seen as a **hybrid** between the *replacement* and *integrated* model of MCM. Notable examples for this approach are Austria, the Netherlands and Lithuania.

The most prominent example in this group is the Netherlands. This country was the one in the 2011 review that already had made the decision to consider cost reduction a key factor in developing the e-channel to a full service channel in order to replace

the face-to-face channel as the primary channel for service delivery by 2014. Now, in 2014, the Netherlands have largely succeeded in this model with the internet being the primary channel for all jobseekers in the first three months of their joblessness.

"In 2010, national austerity measures required the Dutch PES (UWV Werkbedrijf) to rethink their service concept in order to meet the requirement for significant budgetary cuts. The PES therefore developed digital channels to interact with jobseekers with a focus on jobseekers that receive unemployment benefits, aiming to serve every jobseeker only via digital channels in the first three months of their unemployment by 2015. For months 4 to 12, only 10% of jobseekers were to receive additional intensive training and coaching sessions (i.e. (those who are not Information Technology (IT) literate and unemployment recipients who do not understand the Dutch language)."

The Lithuanian PES' strategy is inspired by the Dutch model and largely headed in the same direction. Some PES are not as **explicit** in their '**internet first**' strategy, but do recognise the Internet as the most important channels and see it in the future turning into the main channel for service delivery make (some of) the others obsolete. The Austrian PES' approach regarding the use of the channels changed from leaving the choice of channel up to the client towards a defined channel strategy (but this is still work in progress). The Estonian PES strives towards an online only strategy for certain key services, but still sees the need for other channels:

"Our overall strategy is to make all the services that do not require personal contact available online. An important starting point is that the clients are not asked to present on paper any data that can be retrieved automatically from other registers. We encourage the use of self-service portal, but also give assistance via other channels when needed. For example, call centre and information desks can also be contacted via Skype."

The German PES is in the transition period of going from a "passive or voluntary" multi-channel strategy in which the customer chooses the channel he/she wants towards a strategy based on "**active channel controlling**" in which clients are more actively steered towards the online channels.

2.1.2 Strategic choice 2: channels as supplements

Some PES organisations recognise the supplemental value of the different channels and build their strategy around that. While some channels might be seen as more important than others in this strategy, the other channels have clear focal points. With the soft focus on one primary channel, this can be seen as a **hybrid** between the **supplemental** model and the **replacement** model.

The Belgian VDAB is a good example of this strategy. While the PES recognises that the overall evolution in customer needs move towards **fast and 24/7** (self) service, it makes deliberate choices on which channel is best suited for which service. It sees the different channels as complementary to a certain extent, and not just parallel options. The main reason behind this is that it creates an increase in communication volume and hence in work load.

Another good example, especially in the context of blended services is from the Swedish PES:

"The PES officers at the contact centre are especially responsible for one target group; job seekers who are job ready, during their first four months of unemployment. Contact is established via outbound telephone calls and booked phone meetings, to work with follow up of the activity report as well as the action plan (IAP). If the job seeker is still unemployed after four months, the job seeker is referred back to the local office."

The Swedish PES recognises that the Internet is the most important channel (in terms of visits), but also sees an increase in the **volume** of contacts via the call centre. Where this PES is somewhat different from the other PES organisations is the way in which the call centre and online (self) services work in **tandem**. The two channels are designed to work in this way and the clearly defined strategy refers job-seekers to the right channel at the right moment in the process. As such, Sweden could also be classified within the next category of strategic choice.

2.1.3 Strategic choice 3: all channels open

The last strategy makes no explicit choices in how the different channels are positioned and offered to the clients. The channels here are '**blended**' in the sense that they are part of the entire palette of channels. It is noteworthy though that, despite the fact that most PES organisations in this cluster keep all channels open, most of them see strong movements towards the Internet as the most used channel. Most chose, from a customer service standpoint, to keep all channels open. The Finnish PES for example has chosen that all individual clients can be served online, via the telephone and face to face. The choice of service channel depends on the matters at hand and the client's needs. Notable examples for this approach are Estonia, Spain, Finland, Portugal, Slovenia and Poland.

An example of the explicit choice to keep different channels open is found in Estonia:

"Our aim has never been to substitute face-to-face service with e-services. User-friendly online tools provide clients with an easy and efficient way to work independently, however face-to-face counselling remains very important to increase the likelihood of employment for a jobseeker."

Despite the deliberate choice to keep all or multiple channels open, several PES organisations try to **steer** their clients to the **online** channels. The Slovenian PES, for example, actively steers jobseekers to use the most appropriate channels, while taking into account their individual needs.

The French PES does not mention a specific strategy. They do mention their intent to move more towards electronic services, but also recognise that: *"Although Pôle emploi already provides numerous e-services, they still do not carry much weight –both qualitatively and quantitatively– as compared to other channels (face to face, telephone)."*

2.2 Developments in blended service delivery and digitalisation

The different types of strategies followed by the PES lead to differences in their service and channel development and hence shows differences in their blended service delivery. With regards to blending services, we see a clear **divide** between the organisations who are trying to blend channels within services (either as support or back up) and those who position the channels (for now) in parallel and see blending in more general terms.

Table 2: Developments in blended service delivery

	AU	BE	DE ³	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Blending within services⁴														
F2F identification before online use (or after online initial registration)	X		X								X			X
Create CV/profile online and check with counsellor or get support	X	X	X			X						X	X	
Counsellor checks client's activities online and used on offline discussion (e.g. during job matching and/or counselling)	X		X			X				X				
Start job Matching online but move offline when unsuccessful		X	X							X				
Digital registered info is used when profiling offline		X	X			X				X		X		
IAP created online but signed/finalised in person												X		X
F2F support for online registration	X	X	X			X				X		X		
Seek out additional info for digital profile by phone			X							X				
Online data used for offline matching	X	X	X			X					X			

³ While the German PES offers most services via multiple channels, it notes that the default channel is F2F

⁴ This includes specific examples of how different channels are blended within one specific service

	AU	BE	DE ³	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Co-browsing													X	
Blending within services⁵														
Initial Registration	X ⁷	X ⁶		X ⁷	X ⁸		X						X	X
Profiling/ Assessment									X				X	
CV preparation		X		X	X		X	X	X				X	X
Job matching	X	X	X	X	X		X	X					X	X
Employment Counselling			X	X		X ⁹	X	X	X				X	X
Career Guidance			X			X	X	X	X				X	X
Creation of IAP			X						X				X	X
Updating / follow up on IAP		X	X	X	X	X	X		X				X	X
Interview Preparation		X	X			X	X		X					X
Offer of measures	X	X	X	X	X	X			X				X	X
Follow-up			X			X							X	X
Referral			X			X								X
Post-placement support			X	X		X							X	
Other			X		X									

5 This includes specific examples of how different channels are blended within one specific service

6 Phone or online

7 F2F or online

8 Only for renewals, initial registration needs to be done F2F

9 Phone or F2F

The examples of blending within services broadly break down in **several categories**. In the first type of blended services, legal or technical obstacles prevent clients from using the same channel for the entire service. For example, some countries require an in-person identification to finalise an online registration process. In the second type of blended services, channels are used to support other channels. This either takes the form of the phone or F2F being used to guide clients through electronic services or information collected online that is being used as input for an offline meeting.

The second part of the table shows which countries see the redundancies between channels as part of their blended service strategy. In most cases we either see that all three main channels (phone, online and F2F) offer the same functionality, but we also see scenarios of the online channel with one other channel as back up or alternative. For many PES, this aligns with their strategy of keeping multiple channels open. However, this does not imply that these PES are not moving forward with the development of their online services. The **most common** types of services that are being offered online (and used frequently) are those that are very **data driven**¹⁰, these include:

- Initial Registration and update of profile information
- CV preparation
- Job matching
- Searching for jobs (and training)
- Scheduling (e.g. of meetings)
- Support tools (e.g. self-assessments, CV help, and online trainings)
- Logging and tracking (e.g. status information)

The table below gives an overview of the services that are being offered online (digital) and in person by the different PES organisations.

¹⁰ By this we mean that many data points need to be entered and/or transferred, for which online channels by definition are better suited than the phone or F2F

Table 3: Developments in digitalisation

	Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
AU	<p>With the implementation of the eService (eAMS account), which is a personal account for a jobseeker, the intent was to offer most personalised services online as well as in face-to-face contact. The access authorisation is handed out personally by the counsellor or is sent by mail in which case the customer has to acknowledge the receipt of the letter.</p>	<p>F2F offers more time for the counselling interview. Despite offering most services online some require personal authentication. E.g. unemployment benefit claim can be made online but, need F2F appointment to have their identity and documents checked.</p>	<p>Not specified.</p>
BE	<p>Strategy is to provide as many self-supporting instruments as possible for the jobseeker. Individual citizen will have to take their job careers into their own hands. VDAB aims to provide these tools.</p> <p>For the moment it is possible for any jobseeker to make a fully personalised online portfolio which is in connection with the vacancy database, and which uses sophisticated matching techniques (i.e. based on competences). As to learning, VDAB have an expanding set of web courses, supported by a network of online coaches. VDAB is working towards an efficiency improvement by forcefully stimulating registration processes through contact centre and website. The long-term aim is to limit F2F registration to 10%.</p>	<p>For most services there is at least a digitalised element, e.g. the personal development plan available online, which allows a citizen to detect the gap between present competency profile and future desired profile. A development action plan can then be started.</p> <p>There always remains the option to have a F2F talk for more in depth guidance. The strategy (for the moment) mainly relies on the self-supporting strength of available tools.</p>	<p>For people who are classified as being more than averagely distant to the labour market, VDAB aim to building up F2F contacts (made possible by economising with digitalisation for those who can be helped in that way). VDAB is fully and consciously aware of the dangers of a growing social divide through digitalisation, and the PES is determined to avoid that situation.</p>
DE	<p>In the future, all customers will have personal access to all PES services. The use of digital services is and will always be voluntary.</p>	<p>Counselling will remain personal. It will however be complemented by digital, supportive channels (e.g. chat, video chat).</p>	
EE	<p>Strategy is to make all the services that do not require personal contact with PES staff available online. However, e-services are seen as an alternative channel that won't replace face-to-face counselling.</p> <p>Estonian PES has digitalised the following services; initial registration, help with CV preparation, job matching,</p>	<p>PES has not digitalised the following services; profiling assessment, career guidance/counselling/coaching, preparation of IAP, updating of IAP, Interview preparation.</p>	<p>Foreseen development projects are:</p> <ul style="list-style-type: none"> - Increase attractiveness of EUIF portal for young people. - More information on participation in active measures in the self-service

	Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
	employment counselling, registration for a training course and post-placement follow up support.		portal for jobseekers. - Improve e-service for employers, e.g. signing contracts in self-service portal.
ES	<p>In the area of unemployment benefits, all services provided in person in benefits offices are offered on the website. Examples are; applications for unemployment benefits; certificates and enquiries; suspension and withdrawal of demands; amendment of data; complaints and legal claims. Majority of regions provide the following online services:</p> <ul style="list-style-type: none"> ▪ Renewal and amendment of employment demand; ▪ Obtaining copies & issuing of reports and certificates; ▪ CV preparation & registration; (also in EUROPASS format); ▪ Updating personal data; ▪ Training requests & jobseeking ▪ Satisfaction surveys on training received. ▪ Job vacancies publication ▪ Job matching 	Some services, such as employment counselling, mix an initial in-person provision (first interview) with a follow-up by telephone or electronic means (e-mail and blogs) and for consultation and monitoring of the development of the IAP agreed at the face-to-face stage.	Not specified.
FI	Registration, job-seeking, training-seeking and applying on trainings, CV-online services, reporting of implementation of employment plan, applying for start-up aid (entrepreneurship). Information on career choices and planning, education and training.	PES expert's personal assistance, personal messaging, job and training offers (ongoing digitalisation), appointment scheduling, more integration and automation on e-services.	Not specified.

	Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
FR	<p>Online tools dedicated to jobseekers that were created or improved in the past years:</p> <ul style="list-style-type: none"> ▪ Possibility to make an appointment for F2F interview when ▪ online pre-registration as a jobseeker ▪ Benefits simulation ▪ Improved access to job vacancies (assistance to choose the ROME code for better matching) ▪ Virtual recruitment meetings (pilot launched in February 2014 in 5 regions, also accessible on mobile devices) including access to virtual conferences <p>New services on mobile phone or tablets: updating situation, real-time access to job vacancies, reception of alerts, benefits simulation, participation to online recruitment fairs ...)</p>	Not specified	Not specified
HU	Blended delivery strategy does not exist within the PES but significant steps have been taken to develop mainly on-line services. National PES will develop and introduce a new profiling system until January 2016.	Not specified.	On-line services will be mainly offered for independent job-seekers, including the use of the on-line independent job-search and career building portals.
LT	Registration and job search services are available online.	There are plans to install career guidance/counselling e-services.	Jobseekers prepared and motivated, usually use e-services.
NL	Via the jobsite the following e-service modules can be used; How to find and apply for jobs; Increasing your chances in the labour market; Information about professions and education; Self-assessments; Digital Work Explorer; E-learnings; Online application for registration and application for benefits	Although self-help e-services are increasingly fine-tuned and personalised through the personal e-folder, certain services are still better delivered by combining the e-channel with telephone or face-to-face channels, such as labour market activation and enforcement, in depth coaching or	Approximately 15% of customers can't use online services on Werk.nl (not even with help). From day one, these customers get serviced via local offices.

	Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
	<p>Blended services where online tools can be used to support face to face services. Some examples below:</p> <ul style="list-style-type: none"> ▪ PES staff can use the information from the personal e-folder ▪ data-mining, allows examining CVs of similar jobseekers ▪ CV quality card summarises jobseeker's resume ▪ Sanctioning - shows flags if people don't apply often enough, ▪ 'Work Explorer' is a digital profiling instrument 	group training.	
PL	For unemployed the following e-services are available; first stage of registration or full registration, job vacancies, training offer research, possibility to deliver letter or the proposal to labour office.	Not specified.	Not specified.
PT	<p>The following services are provided online to job seekers:</p> <ul style="list-style-type: none"> ▪ Registration as a jobseeker, submission of a pep proposal; ▪ Management of personal and professional data, ▪ Possibility of obtaining electronic unemployment situation proof; ▪ Possibility to schedule follow-up meetings with career manager; ▪ Search and application for job vacancies, ▪ Monitoring of job applications; ▪ Job vacancies application manager; 	However, it should be mentioned (as stated in the "Insight Report" presenting the findings of the 2012 eGovernment survey) that unemployed citizens are, in general, less likely to use online channels for public, as well as for private services, and have a higher preference for personal contact than average, thus being a hard-to-reach group, especially through the traditional digital channel.	Not specified.

	Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
	<ul style="list-style-type: none"> ▪ CVs registration, update and removal; ▪ Automatic conversion of job request in a CV registration ▪ Active job search techniques; ▪ Information on employment programmes and forms ▪ Online guidance services; ▪ Search for vocational training and pre-enrolment. 		
SE	<ul style="list-style-type: none"> ▪ Online registration of unemployment ▪ Activity report (according to action plan) ▪ Online advertising of vacancies ▪ Vacancy bank & CV database ▪ Vocational information & guides ▪ Labour market forecasting for different professions ▪ Social media (e.g. films about different professions on YouTube) ▪ Activities online (tutorials, films, webinars) ▪ Virtual recruitment meeting ▪ Co-browsing, a personal meeting between the customer and PES officer online 	<p>Apart from the personalised online support, the main potential for further development of online (self-help tools) is still in the field of matching (technical matching using matching engines in a more sophisticated way). Also, combining web services with social media for matching, and communication with customers.</p>	<p>Customers who are not job-ready, in need of advanced guidance or coaching or have poor computer skills should be offered face-to-face service. But this service could of course be combined with self-service tools on the web and telephone service offered by a PES officer at the contact centre.</p>
SI	<p>New self-assessment tools have been developed and more service provisions in the career centres have been introduced; the major improvement has been the introduction of a Job-seekers Portal with personalised e-accounts. The e-account solution allows job-seekers to</p>	<p>The challenge is to serve better youngers via modern ICT channels and devices and also introduce the use of social media.</p>	<p>All unemployed with a low risk to become long-term unemployed are directed to the self-service channels (on-line, Career centre, CC). Those capable and motivated are directed to</p>

Personalised services - what is digitalised?	Personalised services - what is not digitalised?	Specific client groups
define their job-search criteria and supports all important steps in their job-search process. At the same time it allows registered unemployed additional possibilities to communicate with the ESS mostly or exclusively via Portal.		create personal e-account on the J-S Portal and to become our "e-clients".

Three (broad) areas are seen by the PES organisations as areas of service that are much more difficult (and less effective) to digitalise:

1. Counselling, coaching and training

Many PES organisations¹¹ recognise the value of traditional service channels for services that require intensive contact. This in part has to do with the nature of these media (see Pieterse, 2009) that allow for richer forms of interaction. For example, assessing somebody's personality and intentions are hard to gauge via media where you cannot benefit from non-verbal cues and body language. Counselling and coaching are in general also more complicated types of services and therefore more complicated to digitalise.

2. Services that require personal contact

For legal reasons, many PES still require their clients to identify themselves in person and/or authorise the service delivery. For example, the Polish PES lists this as an obstacle:

"One of the important obstacles for people who want to use e-services is the necessity to have qualified digital signature."

Unless legal changes are made, PES organisations are facing a situation they cannot really impact.

3. Services for clients with low digital skills

Even though many countries mention an increase in the skills of their clients in using online services, allowing for higher adoption rates, several PES stress the need to keep the traditional channels open for those who are not able to use online services. Their approach roughly breaks down into two strategies: a) first funnel all clients into the online channels and only those who fail there will be served offline (strongest example: The Netherlands) and b) client gets to decide by himself what channel to use at the start of the process (examples include Estonia, Spain, Finland, Portugal, Slovenia and Poland).

2.3 Success factors

Most PES organisations name several factors that have made their approach towards implementing blended services a success. Despite the fact that many unique factors were mentioned, two stand out as being mentioned most often; **management of the process** and **training of staff**. The latter is seen (see below) as one of the main obstacles towards successful strategies. This is an area where different PES organisations could learn from each other.

11 Including AU, EE, ES, FI, LT, NL

Table 4: Perceived success factors

	AU	BE	DE	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Process Management	X	X				X			X	X ¹²			X ¹³	X
Training of Staff	X	X	X	X		X			X					X
Agile Developments		X		X										
Front & Back Office Integration		X		X										
(Continuous) Testing			X	X										
Adoption of Services					X									
Data Security					X									
Accessibility					X									
Simplification of Services					X									
Process Reform						X								
Financial Aid									X					
Time										X		X		
Vendor Relationships											X			
Motivated and Qualified Personnel												X		
User Involvement		X											X	
High Quality Change Team			X											

2.4 Perceived obstacles & challenges

When analysing the perceived obstacles and challenges, it becomes clear that many PES organisations face similar obstacles. Most of these obstacles (as in 2011) deal with soft issues, change management, communication and staff training (see above for good practices from Austria, Lithuania and Slovenia).

¹² More specifically, the phased approach to implementation

¹³ Taking Baby Steps

Table 5: Perceived obstacles

	AU	BE	DE	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Change Management		X	X			X	X			X			X	
External Communication		X				X				X ¹⁴				
Internal Communication						X							X	X ¹⁵
Staff Training			X			X							X	
Budget Constraints					X ¹⁶									
Lack of Right People		X ¹⁷												
Time to Market (too long)		X												
Channel Strategy (what service via what channel)													X	
Legal Obstacles (e.g. data protection)			X	X										
Expansion of Networks/Partnerships						X								
Customer Orientation						X								
Demographic Changes								X ¹⁸						
The Human Factor				X					X					
Technical Issues/Challenges		X	X	X						X				
Time						X				X			X	
Resource Allocation						X	X							X

14 Facing public opinion and media criticism

15 To convince employment advisors that the e-coaching approach will not lower the quality of services and will not undermine the importance of their work

16 Specifically how budget constraints impact the pace of development

17 In this case the availability of project leaders, not the lack of people

18 Specifically dealing with the demands from younger generations

It is worth noting that **IT related issues** were mentioned to a much **lesser** extent than in the 2011 Peer Review. This aligns with the observation that channel strategies have reached much higher levels of maturity in 2014 and that most PES organisations have succeeded in bringing many more services online. This has arguably led to a stronger focus on other aspects of the multi-channel strategy, such as the changes in the organisation. The Belgian PES pointedly states that *“maturity of change management in general remains a strong point of attention in our organisation.”*

3. Measuring the performance of service delivery

Measuring the performance of service delivery was not only identified in the 2011 as a key issue, but was again mentioned by many PES in 2014 as a challenge or obstacle. Measuring performance is a challenge that virtually all governmental agencies face in terms of evaluating (e-)service delivery (see e.g. Peters, Janssen & Van Engers, 2004; Greiling, 2006), but also for the performance of the organisation as a whole (Behn, 2003). The key challenge is twofold; a) defining measurable outcomes (e.g. what is performance & what is satisfaction?) and b) finding relevant and robust data and metrics to measure these outcomes. So far, no successful frameworks were that reached widespread adoption. However, a number of statements can be made about the measurement of performance of service delivery:

- **Three key components can be defined:** a) effectiveness, b) efficiency and c) satisfaction
 - Effectiveness points to the success of delivering services to clients
 - Efficiency points to the level of cost-consciousness involved in this process (is the way the service is being delivered the cheapest without making (too many) concessions towards effectiveness and satisfaction?)
 - Satisfaction refers to the (client and government) perception of the service quality
- The problem with the three components is that it is really hard to balance them without unlimited budgets. Efficiency (from a cost-perspective) usually leads to lower satisfaction and a focus on satisfaction might impact efficiency and even effectiveness.
- The solution is to either focus on one or two of the components OR to find a balance between the three. This, by definition leads to a compromise.



Trying to find the best **balance** between the components requires various data sources and measurements at different points in time:

1. **Satisfaction** is typically measured during user studies (most often surveys), or by asking clients about their satisfaction at the end of the service interaction.
2. **Effectiveness** is either measured by asking clients, or by measuring some output variable (e.g. successful unemployment registration) using system data, focussed on success.
3. **Efficiency** can be measured by contrasting effectiveness with budget and/or other financial information.

By measuring over time, changes can be identified and adjustments made. Furthermore, as more advanced data collection and analysis methods (e.g. customer data mapping and big data analyses) become commonplace, the possibilities to improve performance improve. This does however require a well thought-out evaluation strategy.

In the section below we discuss the measurement practices of PES organisations.

3.1 Evaluation methods used

A majority of organisations use surveys and/or monitoring to measure performance, with 5 PES using a combination of the two. **Surveys** are used by most of the organisations to

evaluate (in terms of satisfaction and success) service delivery, while **monitoring** is used to track clients' behaviour. The Swedish PES is a good example of this:

"The measurements should be focusing on both customer experience (surveys) and customer behaviour (statistics), to be compared with other services. For example, we measure customer satisfaction with our new co-browsing service via survey. We also measure customer behaviour and case efficiency via statistics."

Another example of a more **comprehensive approach** is provided by Finland:

"Customer satisfaction is measured in every channel by surveys, feedback and continuous evaluation. In terms of customer satisfaction, digital services are measured by customer feedback, service volumes, usage rates and digital penetration. The main idea is to recognise weaknesses and, especially, prevent and respond immediately to possible errors. Every service is monitored separately in terms of technical reliability. Technical monitoring is crucial to maintain service standards as system failures have a massive impact on customer satisfaction in general."

Some organisations (e.g. Portugal) are only planning to evaluate and have not evaluated much in the past. Other organisations are conducting surveys and/or monitoring, but do so only for a selected number of channels. For example, the Hungarian PES only measures satisfaction in the face-to-face channel, and the Spanish PES for telephone and face-to-face services. While Spain is looking to **systematise** evaluation across all channels, no single organisation seems to measure and monitor satisfaction of *all clients* via *all channels* in *all service interaction* and monitors (through **customer journey mapping**) *how* clients move *between* channels and services.

The table below summarises the various measurement methods used by the various PES organisations.

Table 6: Types of measurement used

	AU	BE	DE	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Surveys¹⁹	X	X	X	X	X	X	X	X		X	X	X	X	X
Monitoring General²⁰	X	X	X	X	X	X	X					X	X	X
Common Assessment Framework (CAF)²¹								X	X					
Data Warehouse Analyses	X	X			X									
Research projects	X													
Online Journey Mapping		X												
Panels		X												
Complaints Registration	X	X	X		X							X		
Experiments										X			X	
Pilots	X	X				X				X			X	
Ex-post Econometric Data Analysis										X				
General Policy Evaluation											X			
Mystery Shopping													X	X
Feedback from Clients Given to Counsellors			X			X						X		

Some interesting examples of evaluation methods exist. First of all, the Belgian PES (VDAB) is the only organisation to mention the application of customer journey mapping (CJM). CJM is typically used to track how clients move between channels and services.

19 Most of these surveys are aimed at jobseekers in general, including (some) questions about service channels. It also includes surveys focused on only one or two channels.

20 While not made explicit, most of this probably involves surveys.

21 For the latest version of the framework, see <http://www.eipa.eu/en/topic/show/&tid=191>

The great benefit of CJM is the detailed insights into the experience of clients going through the service delivery process. It provides insights to optimise (mostly supplemental) channel strategies and steering towards other channels. However, it only works if a single client identifies himself before using any channel. Furthermore, if applied on a large scale, CJM generates huge amounts of data, easily leading into 'big data' problems.

3.2 Challenges towards measuring effectiveness and client satisfaction

The lack of sophisticated evaluation strategies is reflected in the challenges seen by PES towards measuring effectiveness and satisfaction. Many of the challenges deal with a) finding the right **indicators** and b) figuring out how to measure **within** and **between** channels.

The Dutch PES summarises this key challenge very well:

"The Dutch PES wishes to measure the effects of face-to-face services in conjunction with digital services. The objective is to answer the following question: what kind of channels (face-to-face, e-channel, telephone channel) and/or instruments (personal interview/e-services) work for what target group in order to get jobseekers back into work as soon as possible and to reduce the cost of benefits for society?"

Table 7: Challenges towards measurements

	AU	BE	DE	EE	ES	FI	FR	HU	LT	NL	PL	PT	SE	SI
Creating Strategy, Goals and Indicators														
Creating systematic evaluation across all channels					X	X								X
Finding the right indicators		X			X	X								
Evaluation effectiveness of single channel in blend				X	X									
Creating continuous feedback							X							
Measuring effectiveness of PES as a whole ²²					X	X								
handle the 'informal' part of job-seeking process								X						
Measuring effectiveness of new services and channels ²³		X											X	
Convince management of the importance of evaluations													X	
Data Challenges														
Reliable data and evaluation			X		X	X								
Elimination of subjectivity									X					

22 How can results showing a shortening average unemployment duration really be attributed to the work of the PES?

23 For the reason that there is nothing to compare this to

Convince clients to give feedback	X
--	---

Improving analysis of outcomes	X
---------------------------------------	---

Interpretation Challenges

renewing the customer segmentation system	X
--	---

The above table breaks down challenges into a number of groups:

- 1. Creating strategy, goals and indicators.** This applies to the more strategic challenges. How do we want the service strategy to function and what are the best indicators to evaluate this? Most of the challenges mentioned by the different PES fall into this category.
- 2. Data challenges.** The second group deals with methodological and data related challenges, such as gathering reliable data and eliminating subjectivity. This is an area where PES organisations can learn from each other.
- 3. Implementation challenges.** The only challenge here was mentioned by the Hungarian PES. This organisation raises the question how data can be used to renew the customer segmentation process as a basis for services and service evaluation.

Finally, the Hungarian PES is the only organisation focusing specifically on the entire context of the jobseeker, beyond the scope of the PES organisation:

[How to] handle the 'informal' part of the job-seeking process and job offers as 60-75% of the vacancies are not coming through the formal channels (such as PES, regional PES, newspapers, websites etc.) Linking into this challenge is how to evaluate the jobseeker's own efforts within this process.

The German PES raises a very relevant point with regards to measuring the effectiveness of blended services:

In the case of blended services, the difficulty arises of attributing effects to specific services (face-to-face or digital). This applies to both effectiveness and customer satisfaction.

4. Context – PES business models and their surrounding labour markets

While the overall economic situation in the EU is slowly improving as of 2014, the overall labour market in Europe can certainly not be classified as good. The economic crisis had two major effects on most of the PES organisations:

- Higher unemployment rates, which led to higher workloads for most PES organisations
- Financial reforms, which have in general led to lower budgets for PES organisations

These developments have affected PES strategies in some countries, but not in others. PES organisations from Estonia, Spain, Lithuania, the Netherlands and Portugal mention how the rise of unemployment has affected their functioning and/or plans to implement blended services/multi-channel management.

Several PES organisations have adopted **ad hoc strategies** to deal with the crisis:

Estonia: For the staff of EUIF it meant very large caseloads – a large number of clients and a lot of paperwork. In order to improve access to information and alleviate employment advisors' case-loads, information desks were introduced in employment offices and a national call centre was established in 2009.

Other PES organisations, however, mention that surrounding labour market developments have not **affected** their strategies:

Finland: The level or structure of unemployment has not been a significant factor in planning or implementation of e-services.

Also, some PES organisations mention how they were **prepared** for the crisis, due to work set in motion beforehand:

Spain: The rise in the number of unemployed also meant an increase in demand for PES services, an increase which was organisationally manageable thanks to the modernisation process that begun two years earlier

However, most PES, such as Belgium (VDAB), Lithuania, Portugal, Slovenia and the Netherlands do mention that **external developments** have affected their strategy. Some examples:

The Belgian PES remarks that: "Growing youth unemployment has given us an extra stimulus to connect with the younger jobseekers in ways that are familiar to them."

Lithuania: "The expansion of e-services was determined not only by the growth of computerisation in all areas and the increase in computer literacy, but also by the increasing caseload of the Lithuanian PES. The number of registered jobseekers per employee, directly dealing with jobseekers, has increased from 141 (in 2008) to 363 (in 2010). The Lithuanian PES' budget decreased from 97.8 million EUR in 2008 to 84.9 million EUR in 2013".

If one general conclusion had to be drawn, it would be that the increase in workload and budget constraints have spurred developments of electronic service delivery in most PES organisations. Many have more explicitly stated that the internet, as a primary channel, has gained in prominence. In countries with higher internet adoption rates (most notably the Netherlands and Sweden), this strategy seems to be paying off in ways described in section 4 below).

5. New developments in the PES context

A number of societal developments already impact PES organisations or will do so in the near future. These are:

- Demographic change
- Increasing mismatch between jobs and jobseekers
- Globalisation and the changing work environment
- Technological Developments

Below we will discuss these developments in more detail, as well as how PES organisations deal with these.

5.1 Demographic changes

One of the key long-term societal developments is the changing demographic of the workforce in Europe, as well as the changing behaviours of the different demographic cohorts. The first is the **ageing workforce** (Taylor, 2006). With older cohorts in the workforce facing lower job security (Hank & Erlenhagen, 2009) and (still) lower adoption rates of technology²⁴, this could potentially increase the workload for PES organisations in the near future.

On the other side of the spectrum we see the **Millennials**/Generation Z entering the workforce. A characteristic of this generation is that they see jobsearch in different ways. According to Enelow, Kursmark and Melnik (2014), "the Millennials are more comfortable with video and online representation. They think a 'paper' resumé is stagnant; they can't 'post or tweet' it. They are shunning email. They've been raised in a technological landscape, which influences what they know and how they think about everything in the world, including resúmes, online profiles, and the entire jobsearch process." (p.4). However, a more scientific study comparing Millennials' work attitude with other generations found small differences in job attitudes (Kowske, Rasch & Wiley, 2010), suggesting that the implied difference in jobsearch behaviour could be exaggerated. Nevertheless, it is to be expected (see also the technological developments below) that younger generations will keep on pressuring PES organisations to innovate.

The Hungarian PES recognises that there is a significant pressure from the younger customers' side (Generation Z) for real time, user friendly and online services. Furthermore, ageing of the population and a shrinking labour force are creating labour and/or skill shortages in a number of occupations and sectors.

5.2 Increasing mismatch between jobs and jobseekers

Many jobseekers use **commercial** job intermediaries. A Dutch study, for example, found that their PES's website ranked 6th out of the ten largest job websites²⁵. A Belgian study²⁶ from 2010 showed that public job sites²⁷ were the 6th most important means for employers to find employees, but ranked higher than private job sites. With their duty to serve all clients, PES organisations tend to deal with jobseekers who have more **difficulty** in finding jobs. The German PES illustrates this point:

"The number of unemployed persons fell from 5 million to slightly over 3 million in 2013. In line with this development the share of hard-to-place unemployed who need intensive face-to-face support is rising."

24 Albeit that this difference is decreasing rapidly.

25 <http://recruitmentmatters.nl/2013/12/16/vacaturesite-top-10-marktaandeel-stijgt/>

26 See http://www.vdab.be/trends/ontcijfert/ontcijfert2010nr20_uitgebreid.pdf

27 VDA B, Actiris and Forem

These jobseekers are increasingly being confronted by a **mismatch** between supply and demand of jobs and jobseekers. Canon and Chen (2011) argue that two types of mismatches exist. The first is a **skills** mismatch, where jobseekers in general have educational levels that are either too high or too low for the jobs offered. The second is a **geographical** mismatch, where the location of jobs and appropriate jobseekers do not match. Both types of mismatches cannot easily be solved by PES organisations, who might see themselves confronted with an increasing number of jobseekers who are hard to place. However, international collaboration between PES organisations (e.g. a European job database) might aid in solving geographical mismatch, especially for jobseekers living in areas close to borders. In addition, an increase in mobility (see further below) could increase the likelihood of jobseekers finding relevant jobs (Hensen, de Vries & Cörvers, 2009).

5.3 Globalisation and changing work environment

Globalisation is leading to a more mobile workforce. In part, this is aided by the open **borders** in the EU, allowing residents to work more freely in other EU member states. This might impact PES service delivery when it comes to providing language support, especially when PES organisations are moving away from core tasks of aiding job search and distributing unemployment benefits towards job counselling and guidance to the employed.

Somewhat related is the increase in **workforce flexibility**. A recent study conducted in the United States anticipates that 40% of the American workforce will be working freelance²⁸ and 80% of all companies expect to have more part-time jobs and/or outsource part of their work. A Dutch study from 2014 echoes this study as it reports that 30% of the Dutch workforce will be in flexible positions²⁹. This will most likely lead to an increase in the number of people looking for jobs (mostly part-time) in the coming years. Many people in this scenario will have multiple part-time or freelance jobs. This development may not be relevant to all PES, but it might impact how they work in coming years.

5.4 Technological developments

A number of technological developments are changing the way jobseekers look for jobs and interact with other government services, as well as how governments offer their services and design their back-offices. These developments are as follows:

- **Rise of mobile computing**

The first development is the increased adoption of mobile devices in society. In most (Western) countries the adoption of smart phones is nearing saturation levels and in its track comes the adoption of tablets. This leads to an increase in mobile devices as a tool for job search. One survey found that "89 percent of employees who said they'll look for a new job in the next year also said their mobile device is an important tool in their job search³⁰". This implies that PES organisations should ensure the accessibility of their websites and services on mobile devices.

PES explicitly mentioning this development are:

- the Polish PES ("*we designed e-services solely on PC. Currently we prepare our services also for tablets and smart phones and other tools*");

28 See http://download.intuit.com/http.intuit/CMO/intuit/futureofsmallbusiness/intuit_2020_report.pdf

29 See <http://www.abu.nl/flexonderzoek>

30 See <http://comerecommended.com/the-rise-of-mobile-job-search-infographic/>

<http://http->

- the Estonian PES (*"the new portal has a responsive web design that works effectively on desktop browsers, different mobile devices, tablets etc."*); and
- VDAB (*"start of project "responsive design", a technical upgrade of our software towards applications on all sorts and sizes of mobile devices. This basic restructuring of the architecture of our application should open up our services for mobile users"*).
- The French PES also mentions the increasing importance of mobile devices.

Related is the increase in the use of dedicated mobile applications (apps) to search and apply for jobs as well as find guidance on this process³¹.

The Slovenian PES is currently developing applications for mobile devices (smart phones and tablets). The Spanish PES has initiated an app to schedule appointments at benefits offices. The Swedish PES has three apps (some under development) for smart phones: vacancy bank, summer jobs, activity reporting app. The Belgian PES started the creation and implementation of a job app for mobile devices and apps to organise job fairs and trainings.

- **Cloud computing**

Cloud computing is a business model of delivering IT resources and applications as services that are accessible remotely over the Internet rather than locally (Leavitt, 2009). Compared to traditional methods of delivering services online, cloud computing has third party service providers hosting the entire IT infrastructure. A wide variety of services is being offered by cloud computing providers. Examples are storing information, database management mining and deploying web services. The latter can range from processing data for scientific purposes to using clouds to manage and provide access to medical records (Hand, 2007). The United States federal government published its vision on cloud computing in 2011 (Kundra, 2011), citing the increase in asset utilisation, improved productivity in application development, better responsiveness to urgent agency needs, and better linkages to emerging technologies (e.g. mobile and tablet devices) as key benefits. In Europe, the UK government has made the creation of a "G-cloud," a government-wide cloud computing infrastructure, a strategic priority (Brittain, 2011). Other countries working on cloud initiatives include Sweden, France, Spain, and Denmark (Wyld, 2010). At EU level, it is likely that Member States will cooperate on an EU-wide cloud (DiMaio, 2009), however this has not materialised yet. The most important benefit for PES organisations of cloud computing is the possibility to outsource part (if not all) of their IT infrastructure. This can lead to fewer IT problems, better scalability and lower costs. The Belgian PES (VDAB) has a number of applications in the cloud, the best example being the roll out of the Google Suite for all 4,500 VDAB staff (mail, hangouts, chat, document sharing etc...).

- **Social & interactive media**

Mentioned as key trend in the 2011 PES to PES Peer Review, social (and interactive) media continue to rise to prominence in governmental service delivery. As argued by Criado, Sandoval-Almazan and Gil-Garcia (2013), "the existence of social media tools in government is changing the landscape of public agencies and bureaucracies around the world. During the last years, public administrations have adopted different Web 2.0 tools, such as blogs, micro-blogging, wikis, social networking, multimedia sharing, mash-up applications, tagging, virtual worlds, and crowd-sourcing, among others" (p.319). Today, many of PES organisations have a presence on social media. Some examples stand out.

31 Examples of mobile job search apps: SnapDat, Resume Review Pro, JobSearch (indeed.com), How to tie a tie, Spark Hire.

The Slovenian PES uses a special interactive application, which is available to all web users in the form of Avatar Lady IZA (interactive assistant).

The Estonian PES allows clients to contact the organisation using Skype.

The Swedish PES also allows for chat or video conversations. The latter uses contact centre staff to respond to these inquiries; the same staff are responsible for Facebook interactions.

- **Big data**

With more and more organisations tracking their clients' behaviours within and across different channels, PES are accumulating a wealth of data that could be utilised to improve the efficiency and effectiveness of the service delivery process, as well as customer satisfaction. There are challenges, however, in dealing with big data. First of all, it requires both the technology and the skills to handle and analyse enormous amounts of data. Secondly, one important risk of big data is the 'forest through the trees' effect. If there is no clear plan or clear goal, analyses on big data are likely to result in data-mining for the sake of data-mining instead of driving analysis with a clear purpose and goal. Nonetheless, the buzz surrounding big data is likely to impact PES organisations.

The Dutch PES explicitly mentions big data as part of its future developments:

"[...] 'big data' is still more conceptual than brought into practice, but expectations are already very high."

In addition, the Belgian VDAB has started working with the Management School Vlerick and the University of Leuven to explore big data, and more specifically new forms of service delivery based on intensive data analysis.

6. Conclusions and questions

Since the last PES to PES Peer Review on multi-channel management in 2011, most PES organisations have made progress in terms of defining and executing their service channel strategies. All PES organisations have increased their online presence and all have witnessed an increase in the use of electronic channels.

The **first question** guiding this paper focused on the extent to which jobseekers can be served online (via self-help and interactive tools) and what the key considerations are for PES. Countries who pursue the most ambitious strategy in pushing their clients towards the online channels (most notably The Netherlands) are showing that it is possible to serve most clients online. This strategy works due to high levels of internet penetration, a population familiar with using electronic government services and high adoption rates of other online applications (e.g. e-banking). However, all PES organisations that follow this strategy do acknowledge that not all clients can and will be served using online services. Most PES are using fall-back mechanisms to serve the people who cannot be served online via traditional means. This applies to a) parts of the population that are not Internet savvy enough and b) services which, by nature, are more complicated to digitalise (most notably counselling). It is uncertain to what extent this fall-back strategy needs to remain in place in the long-term. Today, the following conditions need to be in place for PES to successfully pursue a digitalisation strategy:

- Internet skill and usage level across the population need to be sufficiently high (explaining why this strategy works well for countries such as Sweden and The Netherlands).
- There needs to be a fall-back mechanism to support clients who cannot be served online (where blended services offer a promising development).

The **second question** concerns the innovative developments in digitalisation and blended service delivery. Most PES have made progress in digitalisation since the previous Peer Review in 2011. Most recognise that data-heavy services (such as registration) are best offered online. The most important service that is not there yet is counselling (including coaching and mentoring). Blended services are mostly deployed in support situations (e.g. a counsellor helping with an online form) or situations where part of a service (e.g. identification in person) has to be completed via a certain channel. Other interpretations of blended services see it as purely positioning multiple channels as equals in the complete mix of service channels without much differentiation between the channels.

External developments, such as big data and cloud computing are hardly being explored by the different PES organisations today. Instead, most PES organisations steadily proceed with their strategies to increase the number of online users and balance an increase in jobseekers with lower budgets. Some PES organisations do play with novel solutions, such as mobile applications and delivery of services via other mobile devices, but these developments are far from commonplace. In terms of blending services, we can conclude that different interpretations of the concept exist. Some organisations blend different channels into one mix that allow for (fairly) seamless transfer between channels within one service deliver process; others see the blend in channels supporting other channels (e.g. technology-facilitated customer contact). The biggest obstacles have shifted from being about creating a strategy and other IT related issues to being about *softer* issues such as change management, communication and education/skills.

The **third question** concerns the measurement of the performance of different channels and blended service delivery. Here we probably find the biggest room for improvement. While many PES organisation monitor the use of (some of) their services within the certain channels, and most do conduct surveys, none have comprehensive approaches that allow them to evaluate the performance of all channels. Methods like Customer

Journey Mapping are still in their infancy and none of the organisations mention the use of advanced and predictive modelling based on their collected data. Big data could be a problem in this situation as well, as monitoring the use of all services via all channels (combined with survey data) could easily lead into extremely large data sets. Some organisations virtually do no evaluations at all and are in the process of creating their strategies. While the biggest reported challenge pertains to the creation of an evaluation across all channels, PES organisations also seem to struggle with one the one hand the bigger picture (what does performance mean?) and the other hand operational issues (what to measure, why and when).

Finally, the **fourth question** addressed the issue of change management (on resources) and staff training. Whereas in 2011 we saw most PES organizations struggle with strategic, technical and IT related issues in their service delivery, in 2014 this has shifted towards 'softer' issues. Change management and staff training have surfaced as two of the key problems that organisations face. The ever increasing focus on IT and electronic services leads to many PES organisations changing their workflows and the accompanying uncertainties leads to resistance in the organisation. This in turn requires PES organisations to change (necessitating change management) and train their staff to deal with the new situation. While this is an important topic for PES organisations, few mention good practices or concrete experiences regarding change management. Fortunately, several PES organisations do have good experiences with staff training.

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