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European Vacancy Monitor

Issue no.6/ April 2012

ISSN: 1977-3897

The European Vacancy Monitor is published quarterly by DG Employment, Social Affairs & Inclusion of the European Commission. It is a publication within the Europe 2020 flagship initiative “An Agenda for New Skills and Jobs” and contributes to the implementation of the Commission’s “Employment Package”. It will be further refined taking into account stakeholders’ feedback. Neither the European Commission nor any person acting on behalf of the Commission may be held responsible for the use that may be made of the information contained in this publication. Comments are gratefully received and should be sent to:

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Further Information

- European Job Mobility Bulletin
- Monthly Labour Market Fact Sheet
- EU Employment and Social Situation Quarterly Review
- Employment Package

HIGHLIGHTS

THIRD QUARTER OF 2011

Labour demand growth slows as difficult economic conditions and austerity measures continue

Growth in the demand for labour slowed down in the third quarter of 2011. The year-on-year growth in job vacancies was +6%, down from +12% in the second quarter and +19% in the first quarter, confirming a declining trend. The deterioration in the economic situation and the continued implementation of austerity measures were the main factors.

[>> Read more on page 3](#)

No overall growth in hiring in the EU27 although some countries fared better than others

The number of job-finders in the EU27 decreased slightly (-1%) in the third quarter of 2011 compared to the same quarter in 2010. Furthermore, the number of online job vacancies of Randstad that could not be filled directly from the available pool of candidates was in decline in the third and fourth quarter of 2011 in the five countries where information is available.

[>> Read more on page 4](#)

Some signs of recovery of labour demand in the private sector - but only in selected industries

In the private sector, manufacturing registered the strongest year-on-year growth compared to other sectors in the third quarter 2011 (+20%), mostly driven by Germany’s manufacturing sector, though other countries also witnessed some recovery in manufacturing output and demand for labour. Year-on-year public sector job vacancy growth was strong in the third quarter of 2011, reflecting an exceptionally weak third quarter of 2010.

[>> Read more on page 7](#)

Continuing importance of lower-skilled jobs to the labour market, but highest growth for higher-skilled occupations

Job-finders in lower-skilled occupations accounted for the largest share of job-finders in the European labour market, underlining the continuing importance of these groups in providing employment opportunities. However, highest growth figures can be found in higher-skilled occupations.

[>> Read more on page 10](#)

Country special: Denmark

The Danish labour market reacted strongly to the economic downturn in comparison to other European countries. Job vacancy growth figures were falling, although with an upward trend in industry. The share of job-finders in Denmark is relatively high (10%), which is to be expected in Denmark, given Denmark’s flexible labour market.

[>> Read more on page 18](#)

[>> Top 10 growth occupations per country on page 22](#)

[>> Top 5 PES jobs per country on page 24](#)

[>> Top 5 in the EURES Job Mobility Portal on page 26](#)



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I. INTRODUCTION

While much is known about unemployment, there is relatively little information on the demand for labour. As part of its Europe 2020 flagship initiative 'An Agenda for New Skills and Jobs', the European Commission has therefore launched the 'Monitoring Labour Market Developments in Europe' project. At the heart of the project lies an analysis of job vacancies using a wide range of sources containing relevant data. The project has set up a monitoring and information system which allows the identification of trends in the European labour market, focusing on changes in the demand for occupational groups and skills. The system allows the identification of future labour and skills shortages and can be used as an early warning tool by policy makers, employers and other key stakeholders.

Results of the analysis are disseminated on a quarterly basis through two different publications: the European Vacancy Monitor (EVM), mainly targeting policy makers and researchers setting the framework for more job mobility, and the European Job Mobility Bulletin (EJMB), which provides systematic information on trends on the European Job Mobility Portal for EURES advisors and job seekers. However, the EVM does not focus on employment development and for such information; readers are referred to a dedicated bulletin, the European Commission's Monthly Labour Market Fact Sheet and the EU Employment and Social Situation Quarterly Review.

The **European Vacancy Monitor (EVM)**, targets a broad audience. It aims to contribute to policy development in labour market, education and training issues. The EVM provides a dynamic picture of developments in the demand for labour (job market, demand for occupations, indications for areas affected by recruitment difficulties and skills shortages), using a wide range of sources to produce valid and relevant data. The key sources of information for the EVM include national statistical offices (NSO), temporary work agencies (TWA), public employment services (PES), on-line recruitment services (ORS) and research institutions. Information is also gathered from international agencies such as Eurostat (the statistical office of the European Communities) and Eurociett (the European Confederation of Private Employment Agencies). A network of contacts is used to collect data from all 30 partner countries, including from the public employment services.

The **European Job Mobility Bulletin (EJMB)** The main source of information for the European Job Mobility Bulletin is the European Job Mobility portal (EURES portal) to which national public employment services (PES) transfer job vacancies that are registered at their offices for inter-

national mediation every day. The share transferred to the EURES portal of the total number of job vacancies registered at PES varies from country to country, depending on the approach used in making the contribution. Some countries (namely Denmark, the Czech Republic, Ireland, Finland, Slovenia and Sweden) contribute all their registered job vacancies to the portal, while other countries post only selected vacancies. As the daily data feeds to the EURES portal are accumulated and stored in the EURES database, it is possible to analyse developments on the EURES job market (sectors, occupations and skills in high or low demand, vacancies difficult to fill, etc.) for each country and for the EURES portal as a whole over time.

The European Vacancy Monitor: work in progress - new developments

Comparable data for the whole of Europe is produced from the i) Labour Force Survey (which includes 27 countries for data on the third quarter of 2011), ii) the Job Vacancy Statistics (26 countries, estimations included) and iii) the registration data for job vacancies and unemployed from PES (20 countries). This issue, EVM No. 6, mainly focuses on the third quarter of 2011 comparing it to the third quarter of 2010. Wherever possible, more recent data from other sources has been used.

With regard to the demand for occupations, the results from all sources are based on the International Standard Classification of Occupations (ISCO). To allow for international comparisons in certain specific cases, data from primary sources were harmonised with ISCO, as for example the registration data of PES.

The European Vacancy Monitor is a work in progress. In the absence of a standard survey of employers in Europe that would allow the sharing of information on hard to fill job vacancies, other indicators have been used, such as the relationship between demand and supply in each country and in each occupational group.

This issue of the European Vacancy Monitor benefits from new Eurostat estimates of recent job-finders. The definition of job-finders and the data source remain the same as so far but the treatment of the persons with unreported job tenure changes which in some cases leads to lower numbers.

Trend information (chart 1a) will be included in the EVM from now on, starting with a relatively short time horizon. As more quarters will be included in later issues, the information will become more informative.



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II. SHORT TERM TRENDS IN LABOUR DEMAND

The following available indicators for labour demand are used:

1. Job vacancies (Job Vacancy Statistics), 2. Job-finders (Labour Force Survey), 3. The inflow of registered job vacancies at public employment services, 4. Online job vacancies for temporary agency workers of Randstad (a large international temporary work agency) and 5. The Monster Employment Index of Monsterboard (a large online recruitment service). The strongest indicators are the demand for labour as presented by the LFS for job-finders and the number of job vacancies by the national Job Vacancy Statistics, because these indicators give information across the widest spread of countries. The LFS is given more weight because it concerns flow figures and is very detailed with regard to further breakdowns for occupations, while the JVS uses stock figures at a given moment. The best indicator would be the total inflow or outflow of job vacancies, but there is no (comparable) data.

Slowdown in labour demand

Growth in the demand for labour slowed down in the third quarter of 2011. The year-on-year growth in job vacancies was +6%, down from +12% in the second quarter and +19% in the first quarter, confirming a declining trend. Growth in job vacancies was still positive overall. The change in the number of job-finders, however, was negative (-1%), accompanied by a negative change in the number of employees who were working in the third quarter of 2011 (-0.45%). The number of new job vacancies registered with PES increased by +3% in the third quarter. The most important factors underlying the slowdown in the growth of labour demand were the deterioration in the economic situation.

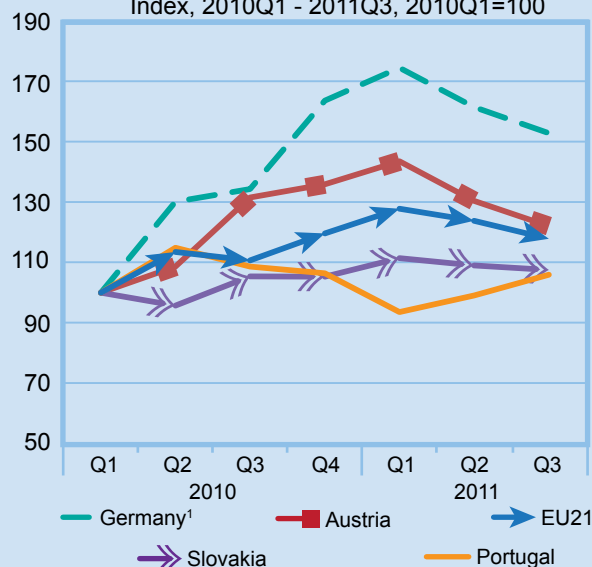
Growth figures of job vacancies in temporary work agencies have been declining since summer 2011, suggesting that there will be a further deterioration of labour demand in the final quarter of 2011 and the beginning of 2012. Correspondingly, Eurostat reports declining year-on-year GDP growth throughout 2011, reaching +1.3% in the third quarter and +0.7% in the fourth quarter of 2011. In addition, the European Commission (EC) reports a substantial drop in the European Sentiment Indicator (ESI) for the third and fourth quarter of 2011 and the EC's recent economic forecasts (2012) show some momentum in economic growth at the end of 2011 and zero-growth for 2012 as recovery is forecasted only in the second half of 2012. Given the lagged employment reaction to economic growth, the EC considers it unlikely that any upturn in GDP in the second half of 2012 will lift employment prospects during 2012. For more

information on employment development, see the European Commission's 'Monthly Labour Market Fact Sheet' and the 'EU Employment and Social Situation Quarterly Review'.

Pace of growth in job vacancies is declining...

The positive trend in the stock of job vacancies in 2010 for 21 European countries slowed down in the second quarter of 2011 and was still decreasing in the third quarter (Chart 1a). Even year-on-year figures in the second and third quarter of 2010 are lower than in previous quarters, indicating that the decreased growth cannot only be attributed to seasonal effects, although the observed time period is rather short. Germany and Austria - with unemployment rates among the lowest in Europe - showed a decline in the stock of job vacancies in the second and third quarter of 2011, while they had been growing in the same quarters of 2010. Two countries with relatively high unemployment rates (Slovakia and Portugal) seem to not have marked a recovery in the stock of job vacancies since the first quarter of 2010. Portugal's increase in the stock of job vacancies in the second and third quarter of 2011 can be attributed to seasonal effects (mostly tourism and education) and year-on-year growth figures of these quarters were negative.

Chart 1a: Development in the stock of job vacancies in four selected countries and EU
Index, 2010Q1 - 2011Q3, 2010Q1=100



Source: EU JVS data based on employer surveys held by national statistical offices; exclusive agriculture; own calculations. See Annex 3 for methodological notes.¹ Definition changed, 2010Q1 - 2010Q3 provided by IAB. The stock of job vacancies is the number of job vacancies measured at a certain moment in time. A job vacancy is defined as a paid post that is newly created, unoccupied, or about to come vacant.

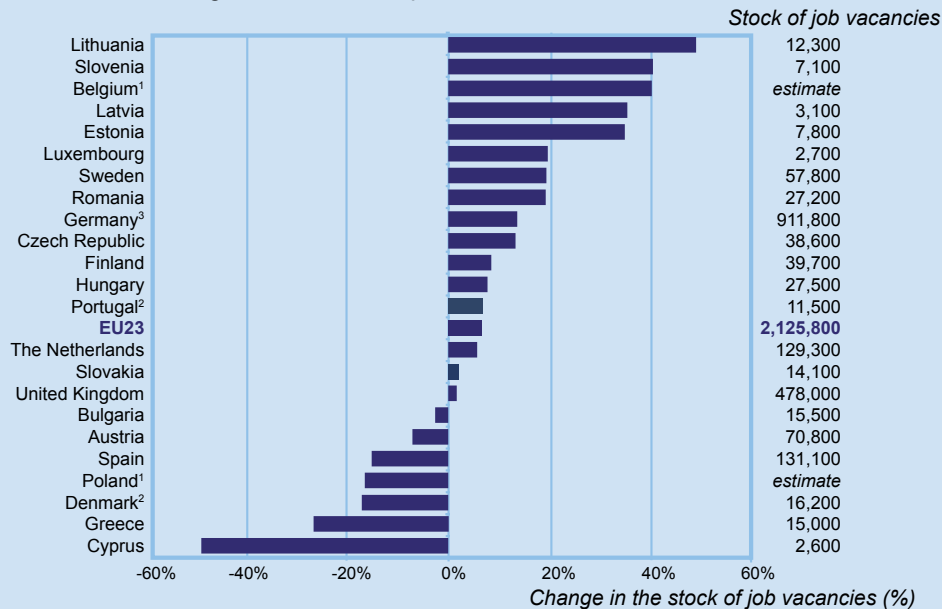


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Chart 1b: Change in the stock of job vacancies by country
Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: EU JVS data based on surveys of employers held by national statistical offices; own calculations (23 countries). Malta is excluded (no data available). For those five countries (Belgium, France, Ireland, Italy, Poland), where the stock of job vacancies is based upon estimates (published job vacancy rate), individual information is only presented for Belgium and Poland (data for smaller enterprises available). See Annex 3 for methodological notes. Agriculture is excluded. ¹ estimate, ² excluding public sector, ³ Definition changed, 2010Q3 estimated by IAB. The stock of job vacancies is the number of job vacancies measured at a certain moment in time. A job vacancy is defined as a paid post that is newly created, unoccupied, or about to come vacant.

... but growth in the third quarter is still positive.

Although growth was slowing down in 2011, the stock of job vacancies in 23 European countries grew by +6% (from 2,003,600 to 2,125,800) on average in the third quarter of 2011 compared to the same quarter in 2010 (chart 1b). In the majority of countries (17 of 23), growth was positive in the third quarter, most notably in Lithuania (+50%), Slovenia (+41%) and Belgium (41%).

Countries with strong growth in the stock of job vacancies in the third quarter were generally countries with strong GDP growth in the third and previous quarters. More specifically, GDP growth was strong in Estonia (+8.5%), Lithuania and Latvia (both +6.7%), Sweden (+4.6%) and Romania (+4.4%), corresponding to strong job vacancy growth figures in these countries. This was not the case for Slovenia where job vacancy growth to a large extent most likely consisted of vacancies for temporary jobs, as an increased share of temporary job-finders in Slovenia suggests. The same holds for the estimated figure of Belgium, although Belgian GDP growth was just above the EU average in the third quarter of 2011.

The growth in the stock of job vacancies is negative in 7 countries and especially so in Cyprus (-50%), Greece (-27%). The weak growth figure for Cyprus reflects a negative GDP growth in the third quarter and a fall in employment (-2.6%). Austerity measures and the job cuts in the public sector account for falls in the stock of vacancies in some countries (particularly Spain and Greece). The changes in Austria and Poland are less easy to account for since the economies of these Member States have been more resilient to the effects of the economic crisis. For Austria, the negative change might reflect more the relatively strong recovery in 2010 than a strong deterioration in 2011.

No growth in hiring in the EU, although differences per country

The number of job-finders (or hirings) in the EU decreased slightly (-1%) in the third quarter of 2011 compared to the same quarter in 2010 (chart 2), though growth varied at country level. Year-on-year growth in the number of hirings



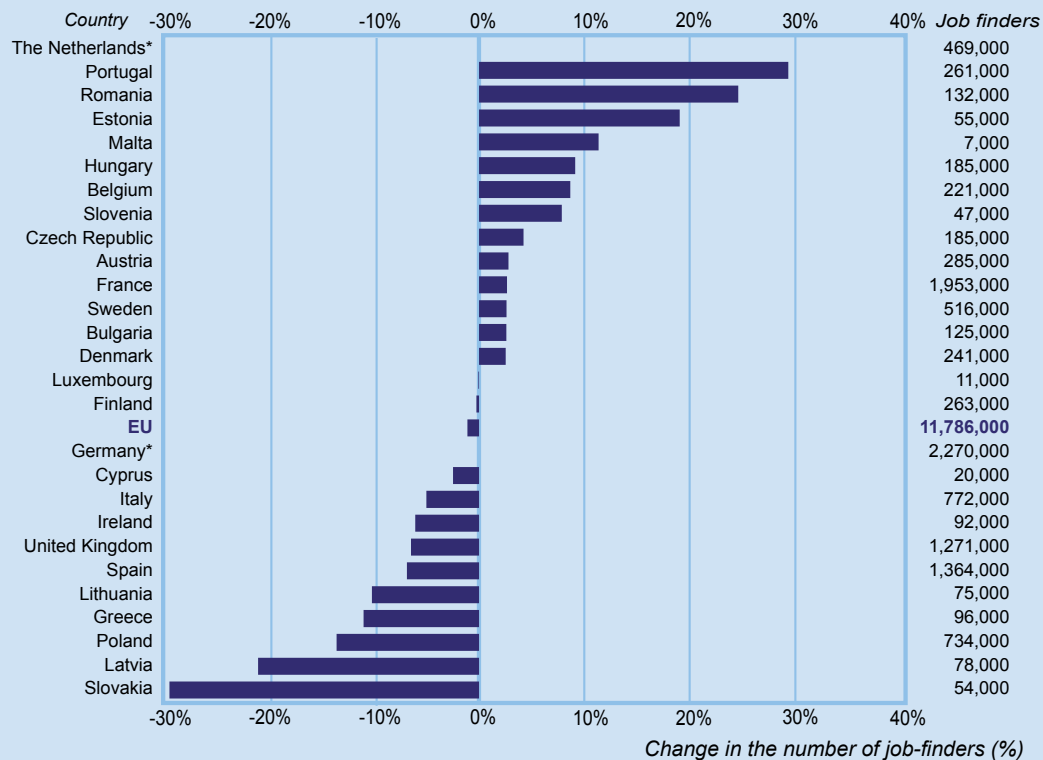
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Chart 2: Change in the number of job-finders

Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: EU LFS data - own calculations. * For NL+DE the number of LFS non-responses in the job tenure, which is necessary to identify the job-finders, is very high and it compromises the estimation of the year-on-year percentage change. For this reason the percentage change is not reported. The figures for NL and DE however provide a reasonable estimate of the actual number of job-finders. Job-finders were employees at the time of the survey and had been employed for a maximum of three months.

in the third quarter of 2011 was positive for 13 countries, most notably in Portugal (+29%), Romania (+24%) and Estonia (+19%). Job-finder growth in Romania and Estonia was accompanied by strong increases in the number of employees (+2.3% and +8.3% respectively). The same holds for Malta (+11%) and Hungary (+9%), where the number of employees increased by +4% and +1% respectively. Growth in job-finders in Portugal is most likely attributed to job turnover, as there was no growth in the number of employees between the third quarter of 2011 and the third quarter of 2010.

Year-on-year growth in the number of job-finders in the third quarter of 2011 was negative for 13 countries, most notably in Slovakia (-29%) and Latvia (-21%). In addition, large European countries such as the UK (-6%), Spain (-7%) and - although figures are uncertain - Germany, are among the countries with a decline in hiring. In the UK and Spain, the number of hirings decreased at the same time the number of employees decreased.

The decline in the year-on-year growth in job-finders in Slovakia (-29%) seems severe, when compared to the increase in job vacancies (chart 1) and the slightly increasing number of employees. However, Eurostat figures show that the share of temporary hirings decreased by 8 percentage points in Slovakia, so the figure most likely reflects a decrease in the number of temporary jobs as employers - anticipating on further economic growth - are less reluctant to hire permanent employees. The decrease in the number of job-finders in Lithuania (-10%) is remarkable, given the strong economic growth and the increase in job vacancies and the number of employees in this country. The data shows that the decrease in hiring is most prominent in professional occupations. Similarly to the general development in Slovakia, there were possibly more temporary contracts for professionals in the third quarter of 2010 than in the third quarter of 2011, resulting in a negative change in hirings of professionals in Lithuania. The strong decline in job-finders in Latvia (-21%) does not reflect a weak third quarter of 2011, but more an exceptionally strong third quarter of 2010, rendering the year-on-year change in job-finders in that country very weak.



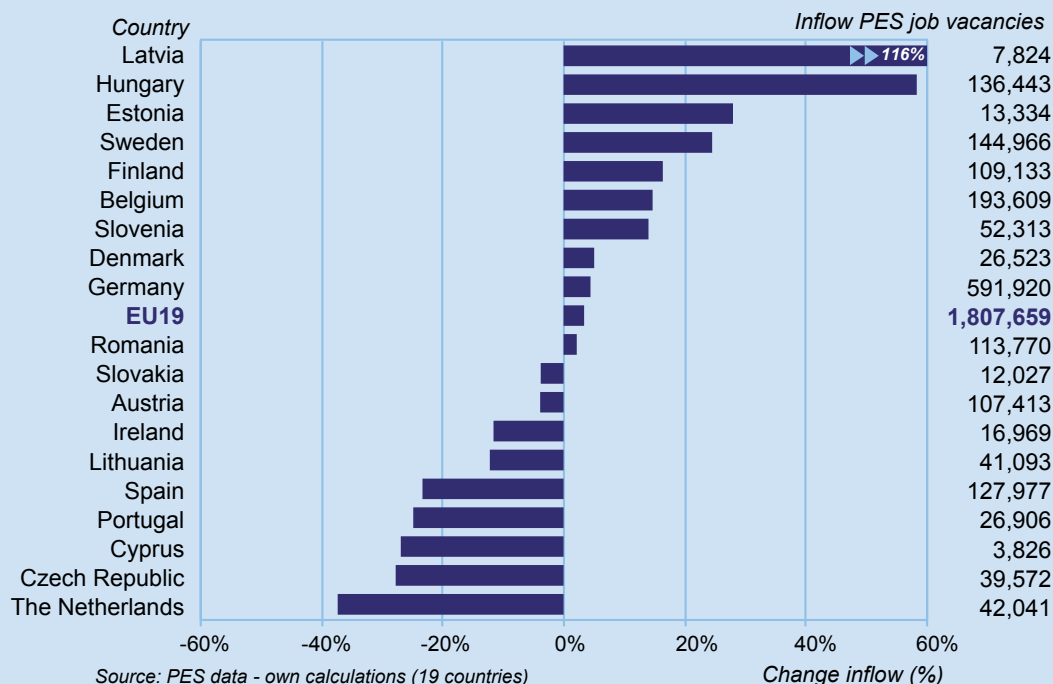
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Chart 3: Change in the inflow of PES job vacancies

Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: PES data - own calculations (19 countries)

Inflow of PES registered job vacancies refers to new job vacancies which were registered in a certain quarter.

Growth in new job vacancies registered with PES in 10 countries, decline in 9 countries

The number of new job vacancies that were registered with PES throughout the third quarter of 2011 (the inflow) increased by +3% on average for 19 countries, when compared to the same quarter in the previous year (Chart 3). 10 of these countries marked a positive growth in the inflow of PES job vacancies, most prominently Latvia (+116%), Hungary (+58%), Estonia (+28%) and Sweden (+25%). 9 countries marked a negative growth and mostly so in the Netherlands (-37%), Czech Republic (-28%), Cyprus (-27%), Portugal (-25%) and Spain (-23%). Much of the differences in growth figures tend to be related to differing economic performance between countries - for some the reference period was disappointing in terms of economic growth and labour market performance.

In Estonia (+28%) and Sweden (+25%), growth in the inflow of PES job vacancies corresponds to the growth in total job vacancies (chart 1), as is the case for Finland (+16%), Belgium (+15%) and Slovenia (+14%). The inflow of PES job vacancies in Hungary increased with +58%, which can mostly be attributed to an increase in subsidised job vacancies introduced as part of active labour market policy in Hungary.

Change in PES inflow of job vacancies was substantially negative in the Netherlands (-37%) and in the Czech Republic (-28%). In both countries, this was most likely the result of changes in PES-policy, as the Dutch PES faced a fundamental reorganisation and budget cuts, and the Czech are changing their obligatory registration policy. In Portugal (-25%), Cyprus (-27%) and Spain (-23%), PES job vacancy inflow was also falling, which is in line with economic developments and developments in total (i.e. not only PES) job vacancies (chart 1).



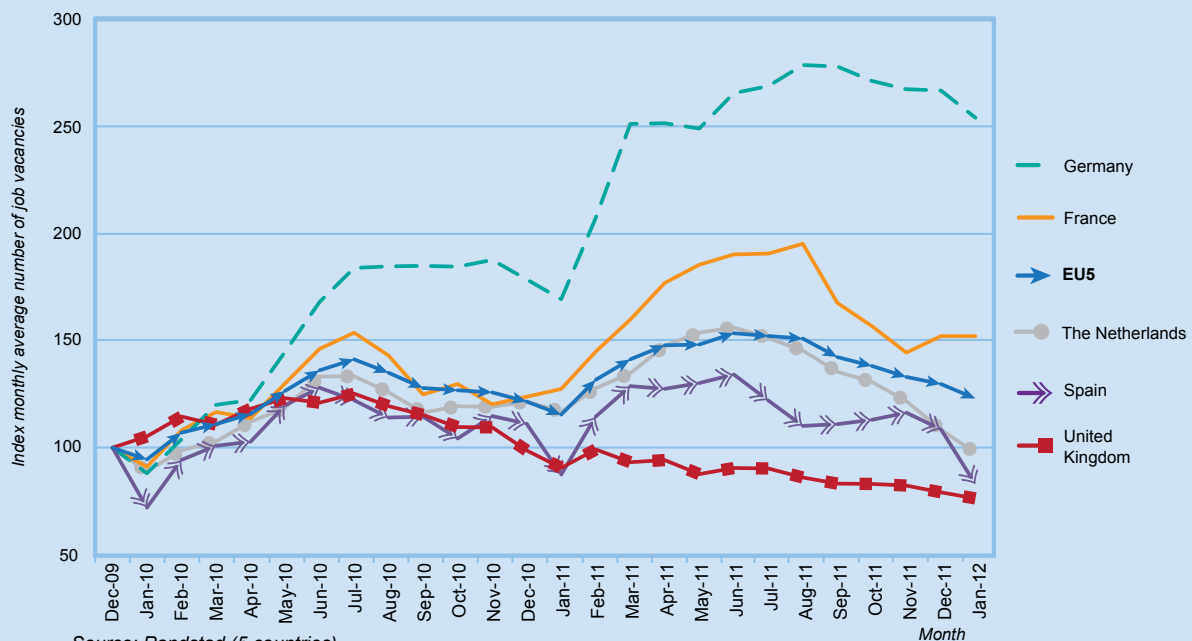
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Chart 4: Development of job vacancies in temporary work agencies (Randstad)

Index, December 2009 - January 2012, December 2009 = 100



Source: Randstad (5 countries)

Numbers are based on the number of open job vacancies published by the subsidiaries of the Randstad Group on the internet. Randstad only publishes job vacancies that cannot be filled directly from the available pool of candidates. The figures are based on daily measurements of the number of open job vacancies.

III. ECONOMIC SECTORS

Growth in job vacancies in the private and public sector

The stock of job vacancies grew positively in the public and private sector when comparing the third quarter of 2011 to the third quarter of 2010 (chart 5). In the private sector, the manufacturing sector marked the strongest year-on-year growth (+20%) compared to other private sectors. This was mostly driven by Germany's manufacturing sector, though other countries also witnessed some recovery in manufacturing (e.g. Sweden, Slovenia, Finland and the Netherlands). Growth in the stock of job vacancies in manufacturing was lower than in the second quarter of 2011 (+39%), however, reflecting a decrease in Eurostat's figures on gross value added in the manufacturing sector as well as decreased economic sentiment due to declining order books, stocks and output expectations (EC, 2011).

The job vacancy stock in construction grew by +7% in the third quarter of 2011 compared to the same quarter in the previous year. This seems somewhat surprising, as year-on-year growth in gross value added and the number of employees in construction declined in the EU27. Again, Germany seems to be the driver behind the job vacancy

growth in construction as Germany's construction sector accounted for most of this growth, in line with a spike in the Bundesbank's figures on German construction orders in July. Nevertheless, the development in Germany's job vacancies in construction was generally downward in 2011, implying that the job vacancy growth will most likely also turn out to be a spike.

The trade and repair sector marked moderate growth in the stock of job vacancies in the third quarter of 2011 (+4%), as did the accommodation and food services sector (+6%) and the other business services sector (+7%). The only sector with a negative growth figure was the transportation and storage sector (-11%), which also marked a well-below average growth in the number of employees in this sector.

Job vacancies in the public sector grew surprisingly strong in the third quarter of 2011 compared to the same quarter in the previous year. Especially in public administration (+24%) and education (+17%) growth seemed remarkably high given the current austerity measures throughout the EU. The growth in job vacancies in public administration can be largely attributed to Germany, although there was also a growth in public administration job vacancies in some other



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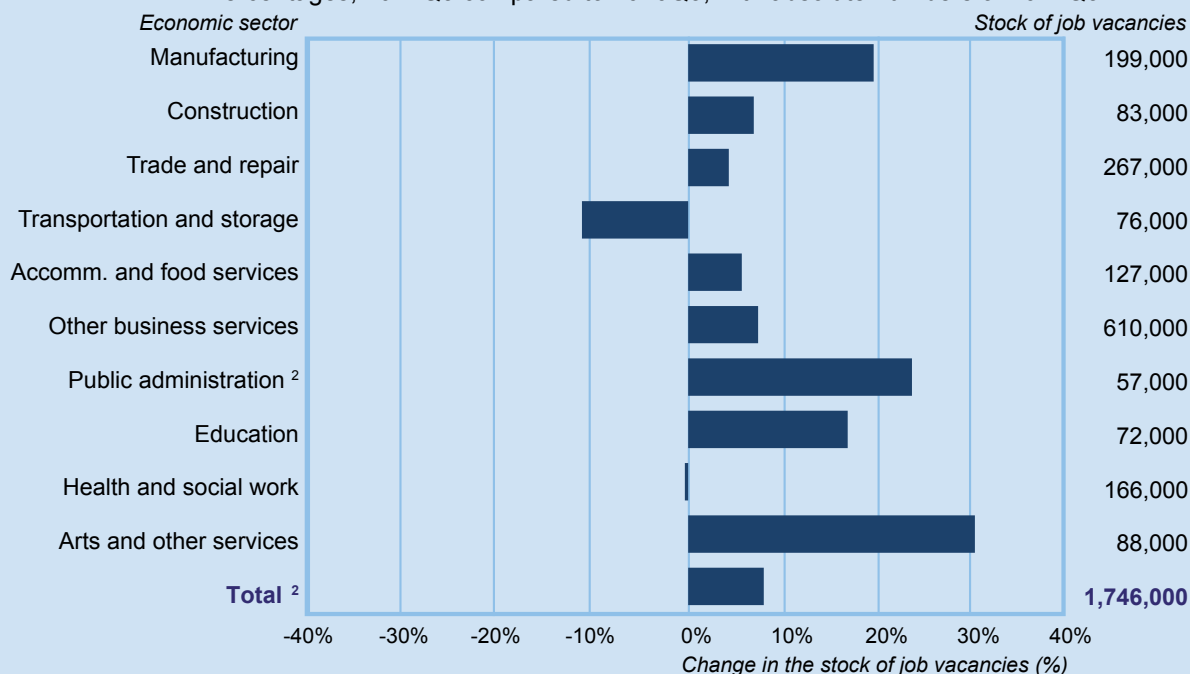
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European countries (e.g. Czech Republic, Estonia, Lithuania, Hungary, Finland, Sweden and the UK). Job vacancy growth in education can almost solely be attributed to Germany, as the stock of job vacancies in this sector doubled in the third quarter of 2011 compared to the third quarter of 2010. The strong growth in the arts and other services sector (+31%) can also mostly be explained by job vacancy development in Germany.

Germany's public sector job vacancy growth in the third quarter of 2011 reflects an exceptionally low stock of job vacancies in the third quarter of 2010, rather than an increase in the third quarter of 2011. Public sector job vacancies in Germany dropped severely in 2010 (mostly so in the third quarter) and grew marginally throughout the rest of 2010 and 2011. Uncertainty about the economic climate and expected budget cuts forced Germany's public sector to be cautious since 2010, as Eurostat's figures on the number of

employees seem to confirm. Year-on-year growth in public administration employees in the EU27 has been declining since the summer 2009 and for education since the second quarter of 2010. In addition, hiring in these sectors decreased severely in the EU27 (chart 6). Germany's cautiousness was more pronounced in health and social work where job vacancies have been declining since the first quarter of 2011 and only marginally increased in the third quarter of 2011 in comparison to the third quarter of 2010. The picture for health and social work in Germany was in line with most other European countries, resulting in a - more or less - unchanged stock of job vacancies in health and social work in the EU27 (chart 5).

Chart 5: Change in the stock of job vacancies by economic sector in the EU (NACE rev. 2)
Percentages, 2011Q3 compared to 2010Q3, with absolute numbers of 2011Q3



Source: EU JVS data based on surveys of companies held by national statistical offices; own calculations (18 countries). Countries included: Bulgaria, Czech Republic, Cyprus, Estonia¹, Finland, Germany¹, Hungary, Ireland¹, Latvia, Lithuania, Luxembourg, The Netherlands, Portugal², Romania, Slovenia, Slovakia, Sweden, United Kingdom. ¹ estimate, IAB estimate for 2010Q3 in Germany.

² exclusive Portugal for public administration. To compare the data for 18 countries, specific sectors had to be merged and the sectors agriculture, mining, electricity and waterworks had to be excluded from the analysis. There was no data available for these sectors for all 18 countries. See Annex 3 for methodological notes.

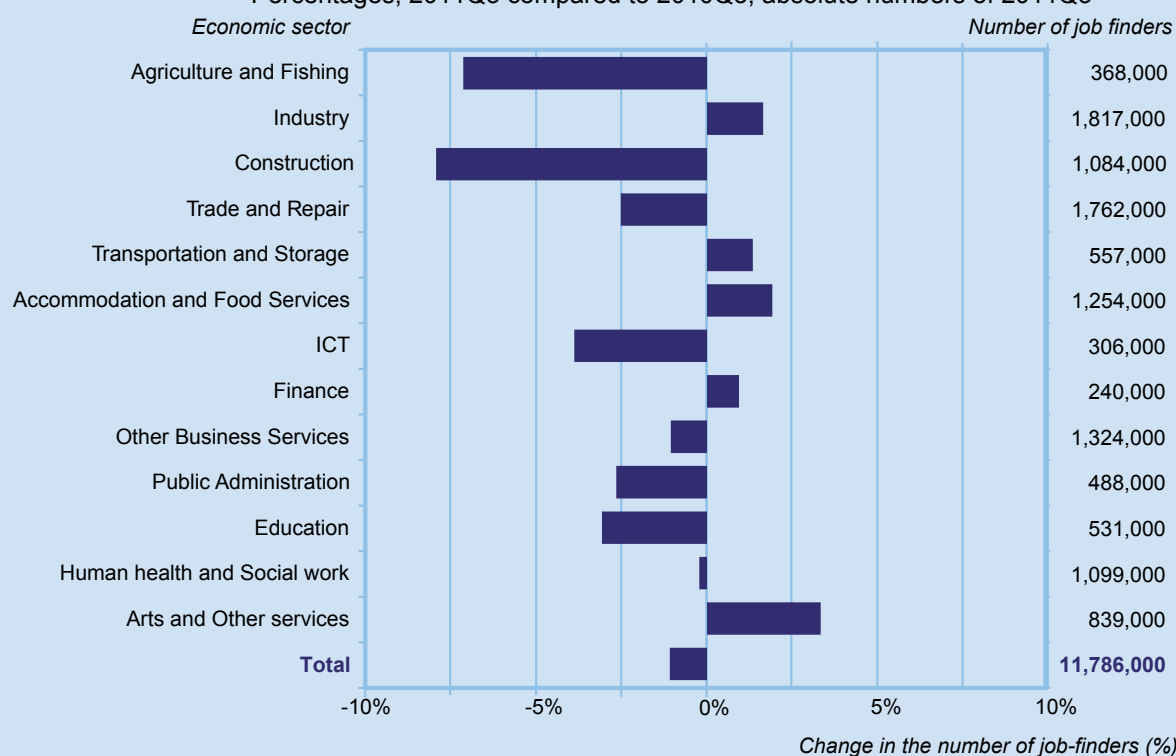
Growth in job-finders differs by sector, but large decline in agriculture and construction

Corresponding to economic developments and austerity measures throughout Europe, the change in job-finders by sector (chart 6) presents a mixed picture. In comparison to the third quarter of 2010, the number of job-finders in the third quarter of 2011 in the industry sector grew by +2%. The number of employees in this sector (source: Eurostat) has been growing during this period and gross value added in the industry sector also grew by +2.7% over the reference period. Similarly, the accommodation and food sector marked a relatively strong growth in the number of employees throughout 2011 and marked a positive growth in the number of job-finders (+2%) in the third quarter of 2011 compared to the third quarter of 2010. The number of job-finders in finance increased by +1% which was broadly in line with a small upswing in the number of employees in the third quarter of 2011. In contrast, the agriculture and fishing sector (-7%), the construction sector (-8%) and the trade and repair sector (-3%) showed a decline in the number of job-finders, which corresponds with disappointing economic

and employment figures in these sectors. In addition, there was a decrease in the ICT (-4%) sector. The +1% growth in job-finders in transportation and storage is likely to reflect labour turnover, as the growth in the number of employees in the third quarter of 2011 was smaller than the growth in the third quarter of 2010. In addition, the growth in the stock of job vacancies in this sector was negative.

The growth in the number of job-finders in public administration in the third quarter of 2011 was -3%, when compared to the third quarter of 2010 and this comes at a time when the number of employees in the public sector is being reduced as a result of austerity measures. Similarly, the year-on-year change in the number of job-finders in education was negative as well (-3%), corresponding with the decrease in the number of employees. The number of employees in health increased in the third quarter of 2011, but to a smaller extent than it did in the third quarter of 2010, leading to a small negative year-on-year growth in the number of job-finders in the health sector. In line with a more positive development in the number of employees in the arts and other services sector, the number of job-finders increased with +3% in the third quarter of 2011 in comparison to the same quarter in the previous year.

Chart 6: Change in the number of job-finders in EU by economic sector (NACE rev. 2)
Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: EU LFS data - own calculations (27 countries).

Based on NACE rev. 2, 2 digit level. Job-finders were employees at the time of the survey and had been employed for a maximum of three months. The number of job-finders per economic sector (NACE) is used to present a more dynamic picture of the labour market (LFS). All economic sectors are included. Industry consists of mining, manufacturing, electricity and waterworks. The category 'unknown' is excluded from the chart.



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IV. OCCUPATIONS

Continuing importance of lower-skilled jobs to the labour market, but highest growth for higher-skilled occupations

Job-finders in lower-skilled occupations account for the largest share of job-finders in the European labour market, underlining the continuing importance of these groups in providing employment opportunities. For example, approximately 2.1 million elementary jobs were found in the third quarter of 2011, which accounts for almost 21% of all job-finders in that quarter, 10.4 mln. (chart 6). Jobs for 'service and sales workers' (2.3 million) made up 22% of the total and jobs for 'craft and related trade workers' (1.3 million) made up another 13%. The high share of lower-skilled occupations was not only visible in the third quarter of 2011, but also in previous quarters.

Although job-finders in lower-skilled occupations made up a higher share, job-finders in higher-skilled occupations were growing faster. The number of job-finders as 'professionals' in the third quarter of 2011 grew the most in comparison to the same quarter in 2010 (+16%, chart 7). Surprisingly, this mainly occurred in education and human health - two shrinking sectors in terms of job-finders, though this may reflect an upsurge in comparison to an exceptionally low third quarter in 2010. Additionally, there was substantial growth of 'professionals' who found jobs in the manufacturing sector which was growing in economic terms and in job vacancies and job-finders. The number of job-finders as 'legislators, senior officials and managers' grew by +13% in the third quarter of 2011 and similarly this growth was mainly prevalent in the public sector, which is declining overall in terms of job-finders. More specifically, the growth in job-finders as 'legislators, senior officials and managers' can mainly be found in public administration. Conversely, the number of job-finders as 'clerks' in the public sector decreased, indicating that the decline in the number of job-finders in the public sector as a whole (chart 6) can mostly be attributed to 'clerks' rather than 'legislators, senior officials and managers'. Most likely, these developments indicate that public sector growth in the number of job-finders as 'professionals, legislators, senior officials and managers' could be accounted for by increased job turnover, for example, as the public sector sheds jobs through early retirements, redundancies, etc, while other providers might be contracted by the public sector to avoid increasing the employee headcount.

The number of jobs found by 'clerks' in the third quarter of 2011 in all sectors combined increased (+13%). This growth can be attributed to multiple sectors, most notably manufacturing, transportation and storage and other services. Another group of job-finders (elementary occupations) mar-

ked relatively strong year-on-year growth in the third quarter of 2011 (+9%). The data indicate that this growth is mainly situated in the manufacturing sector and most likely job turnover contributes to the strong growth in the elementary occupations group as well.

The fall in the change in job-finders was substantially stronger for 'skilled agricultural and fishery workers', corresponding to a strong decrease in job-finders in the agricultural sector (chart 6), though they represent just 1.6% of the total. The negative change in job-finders in 'craft and related trade workers' (-11%) was also in line with the sector as the number of job-finders in the trade and repair sector decreased in the third quarter of 2011. More specifically, the fall in the change in job-finders in 'craft and trade related workers' corresponds to the continuing problems facing the construction and trade and repair sectors, especially in countries such as Spain, Ireland and the UK.

The negative change in job-finders as 'plant and machine operators' (-8%) seems to be contrary to the positive developments in the industry sector. However, 'plant and machine operators' was the only occupational group in the manufacturing sector with a year-on-year decrease in the number of job-finders in the third quarter of 2011. The fall in job-finders as 'technicians and associate professionals' (-14%) cannot be linked to one main sector, but was visible in many sectors, reflecting a general fall in hiring of 'technicians and associate professionals'.

Seasonality contributes to a mixed picture on job-finders

In terms of job-finders by occupation, the fastest growing groups are not necessarily the largest groups. While Chart 7 shows the year-on-year growth in occupational groups, chart 8 shows the top 25 number of job-finders per occupation for the third quarter of 2011 in absolute numbers (Chart 8). The top 25 shows the predominance of low-skilled jobs in PES as it consists mostly of occupations in these occupational groups: 'elementary occupations', 'service and sales workers' and 'clerical support workers'. The number one occupation in terms of job-finders in the third quarter of 2011 was 'shop salespersons' (708,000 job-finders). Seasonal demand may go some way to explain the presence of certain occupations in the top 25, for example for 'agricultural, forestry and fishery workers' (276,000), 'waiters and bartenders' (497,000) and 'market gardeners and crop growers' (131,000), although more jobs were found in this occupational group in the spring (second quarter) rather than the summer (third quarter).

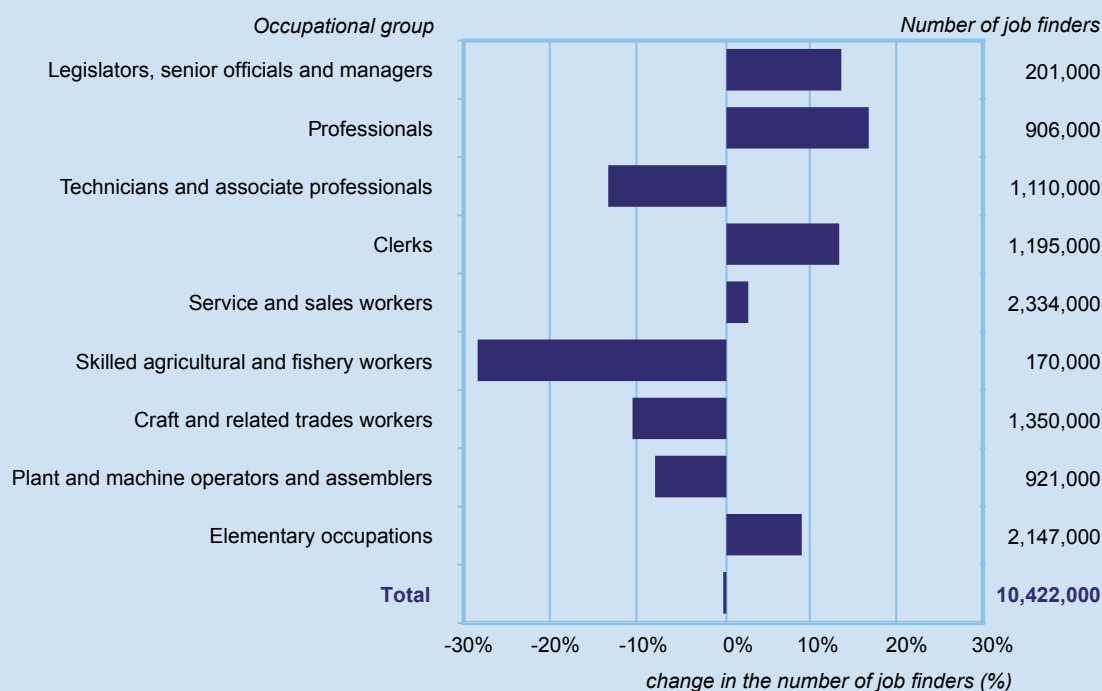


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Chart 7: Change in the number of job-finders in the EU by occupational group (ISCO)
Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: EU LFS data - own calculations (25 countries). ISCO-88 and ISCO-08 1 digit level combined.
Ireland and the UK were excluded due to the lack of data on ISCO for 2011Q3 at time of analysis.
The LFS contains information about the number of job-finders by occupational group per quarter.
Job-finders were employees at the time of the survey and had been employed for a maximum of three months.

Some construction-related occupations in the top 25 marked negative changes in comparison to the second quarter, for example 'building frame and related trades workers' showed 342,000 job-finders in the third quarter, down from 422,000 in the second quarter, and 'building finishers and related trades workers' with 175,000 job-finders in the third quarter, down from 184,000 in the second quarter (chart 8).

Strongest growth in PES job vacancy inflow for high-skilled occupations

In the majority of countries the PES tend to deal mostly with job vacancies for intermediate skills and below. High-skilled occupations, however marked the highest growth among the inflow of job vacancies registered by PES for 19 countries in the third quarter of 2011. The inflow of new PES job vacancies for 'professionals' and 'technicians and associate professionals' grew with +11% (both groups, see Chart 9). In addition, the inflow of PES job vacancies for 'legislators, senior officials and managers' increased by +9% in the third quarter of 2011 compared to the same quarter in the previous year. These developments indicate that high-skilled occupations were in increased demand in the third quarter of 2011 (see also chart 14).

Another occupational group that marked a strong growth in the number of new PES job vacancies in the third quarter of 2011 (+11%), was 'clerks' that had also marked a strong increase in job-finders (chart 7). Modest growth figures in the inflow of PES job vacancies were marked by 'service and shop and market sales workers' (+4%) and 'elementary occupations' (+4%), the latter probably reflecting the positive developments in the industry sector.

The inflow of PES job vacancies for 'skilled agricultural and fishery workers' declined the most in the third quarter of 2011 (-9%), confirming that not only hiring in this occupational group decreased (chart 7), but also the inflow of PES registered job vacancies. The change in new PES job vacancies for 'plant and machine operators' was slightly negative (-1%), corresponding to the decline in hiring of employees in this occupational group. Similarly, the 'craft and related trades workers' showed a decrease in the inflow of job vacancies registered with PES (-2%), as well as a decline in hiring in that occupational group (chart 7) and a decline in hiring in the trade and repair sector (chart 6).



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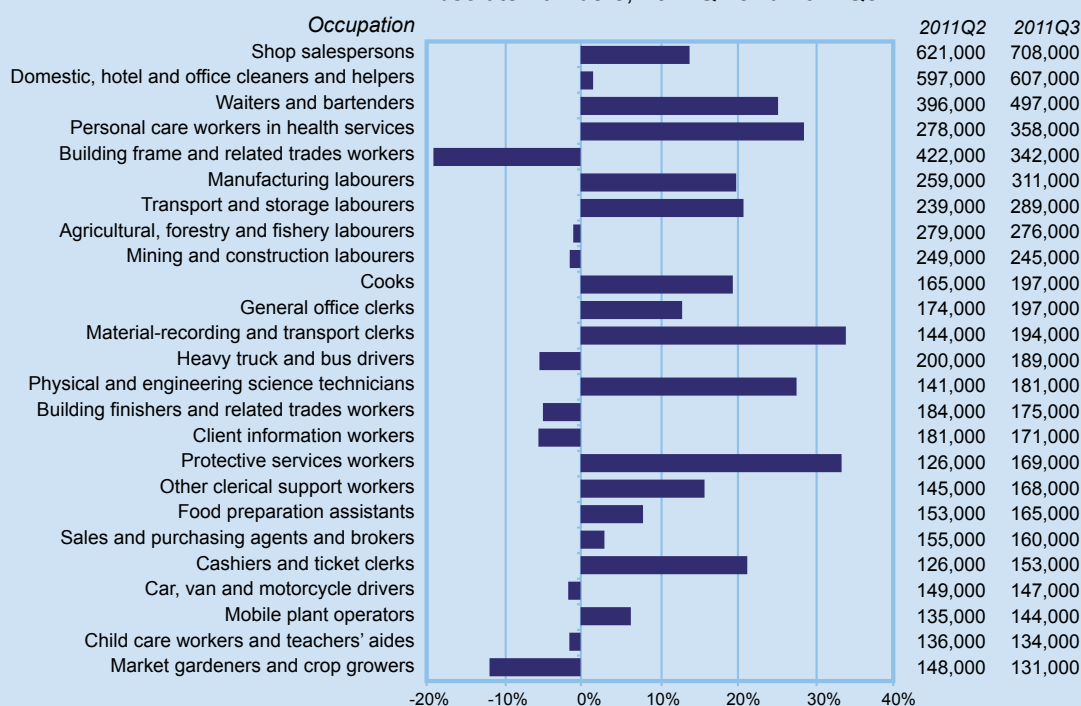
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Chart 8: Top 25 number of job-finders in EU by occupation (ISCO-08)

Percentages, 2011Q3 compared to 2011Q2

Absolute numbers, 2011Q2 and 2011Q3



Source: EU LFS data - own calculations (23 countries). ISCO-08 3 digit level.

Hungary, Ireland, Slovakia and the United Kingdom were excluded due to lack of data on ISCO for 2011Q2 and 2011Q3 at time of analysis. For LFS-data of 2011, only the ISCO-08 classification is available, while only the ISCO-88 classification is available for pre-2011 data. Unlike previous issues of the EVM, comparisons year-on-year on occupations of job-finders are therefore not possible. Therefore, quarter-on-quarter changes and absolute numbers are presented. The figures should be interpreted with care because no seasonal adjustment is possible.

Job-finders were employees at the time of the survey and had been employed for a maximum of three months.

The growth in new PES job vacancies for 'technicians and associate professionals' (+11%) in contrast to the decreased hiring in this occupational group (chart 7) might indicate that employers had excess demand for 'technicians and associate professionals'.

The focus of PES on job vacancies for intermediate skills and below is reflected in their high share of such occupations in the top 25 inflow of PES job vacancies (Chart 10) for: 'hand packers and other manufacturing labourers', 'helpers and cleaners in offices, hotels and other establishments' and 'assembling labourers' when compared to all new job vacancies registered by PES.

Overall, the top 25 inflow of PES job vacancies (Chart 10) presents a positive picture of change for the 10 countries shown in aggregate. However, the number of new PES job vacancies for 'hand packers and other manufacturing labourers' decreased in the third quarter of 2011 compared to the same quarter in 2010 (-10%). In the previous quarter, growth in this occupation was similarly weak (about +1%). In addition, there was a decline of -10% in the number of new PES job vacancies for 'helpers and cleaners in offices, hotels and other establishments'. The decline in PES job vacancy inflow for these occupations corresponds to the increased ratio of unemployed to job vacancies for elementary occupations in chart 13.



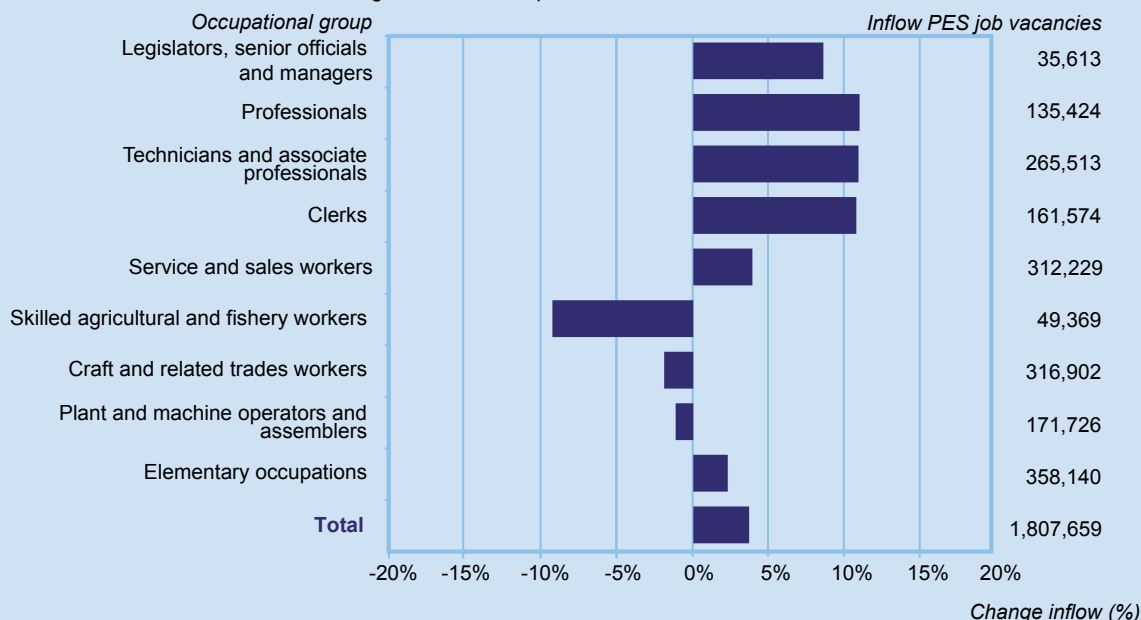
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Chart 9: Change in the inflow of PES job vacancies in the EU by occupational group (ISCO)

Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: PES - own calculations (19 countries included). ISCO-88 and ISCO-08 1 digit level combined.

Countries included: Austria, Czech Republic, Belgium, Cyprus, Denmark, Germany, Estonia, Spain, Finland, Hungary, Ireland, Lithuania, Latvia, the Netherlands, Portugal, Romania, Slovakia, Slovenia, Sweden.

Data on the inflow of job vacancies at public employment services per occupational group is comparable for 20 countries, including the UK with a high share in this total. The category 'unknown' is excluded from this chart. Inflow of PES registered job vacancies refers to new job vacancies which were registered in a certain quarter.

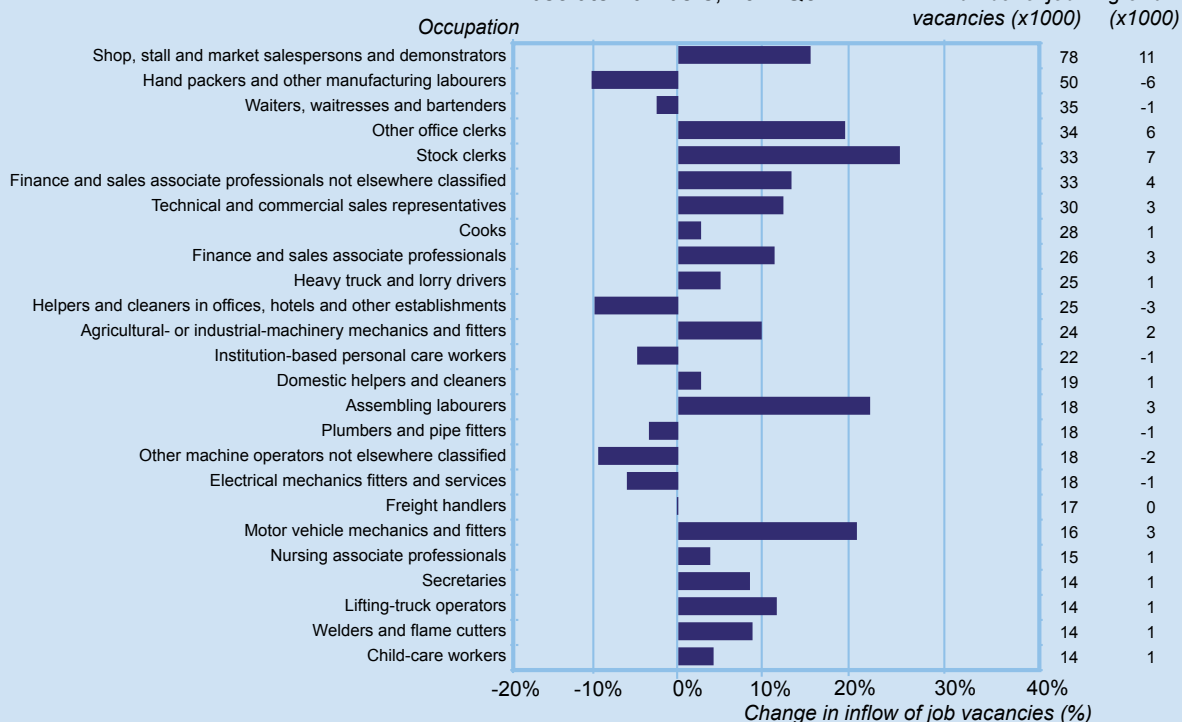
Chart 10: Top 25 inflow of PES vacancies by occupation (ISCO-88)

Percentages, 2011Q3 compared to 2010Q3

Absolute numbers, 2011Q3

Number of job
vacancies (x1000)

Absolute
growth
(x1000)



Source: PES data - own calculations (10 countries). ISCO-88 4 digit level.

Countries included: Austria, Belgium, Germany, Denmark, Finland, Lithuania, the Netherlands, Portugal, Slovakia, and Sweden. Inflow of PES registered job vacancies refers to new job vacancies which were registered in a certain quarter.



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V. RELATIONSHIP OF LABOUR SUPPLY AND DEMAND

In this section, developments in the tightness of the labour market are presented using proxy indicators. The available data permits examination of two indicators: (1) the relationship between the stock of unemployed at the end of the third quarter of 2011 (LFS) and the stock of job vacancies at the end of the third quarter of 2011 (JVS) in Chart 11 and (2) the relationship between the stock of unemployed at the end of the third quarter of 2011 (LFS) and the number of job-finders during the third quarter of 2011 (LFS) in Chart 12.

The first indicator shows the number of unemployed compared to the number of job vacancies for each country. By comparing the ratio over different moments in time (end of the third quarters of 2010 and 2011), the figures indicate how labour market tightness was developing over this period. However, this indicator should be interpreted with care as the ratio of unemployed to the stock of job vacancies tends to be overestimated because job vacancies in agriculture and the public sector are excluded to permit the use of cross-country comparable data. Generally not all available job opportunities are measured by job vacancy statistics because not all job opportunities are announced as job vacancies.

Flow figures would show the number of new job vacancies or the number of filled job vacancies in a certain period in comparison to the number of new unemployed and unemployed who have found a job. This would illustrate developments in the extent to which supply is meeting demand but unfortunately such data are not currently available. Therefore, the second indicator represents the relationship between the number of unemployed at the end of the quarter to the number of job-finders (this is a flow figure, and includes not only persons who were previously unemployed) during the quarter. An increasing ratio over time indicates a less dynamic labour market, because there are less job-finders per unemployed. In contrast, a decreasing ratio indicates a more dynamic market, because relatively more people found a new job. Countries with a decrease in the ratio of unemployed to job vacancies (indicator 1) would be expected to also show a decrease in the ratio of unemployed to job-finders by trend (indicator 2). From the perspective of an unemployed person, the chances of finding a new job become better if the indicators decrease.

Ratio of unemployed per job vacancy unchanged, but differences per country

For the EU27 as a whole, there was no substantial change in the first indicator - the ratio of unemployed to job vacancies - between the third quarter of 2011 and the third quarter of 2010. However, Chart 11 shows that there are substantial

country differences in this ratio. The best perspectives for unemployed job seekers (measured by the number of unemployed by job vacancies in the third quarter of 2011) were in Austria, Germany, the Netherlands and Luxembourg (in this case a very low ratio). In these countries there were low unemployment rates combined with relatively strong economic figures and job vacancies. The ratios of these countries have not changed in the third quarter of 2011 compared to the third quarter of 2010, except for a marginal improvement of the ratio in Germany.

The perspectives for job-seekers in the group of countries with a low ratio of unemployed to job-vacancies are somewhat less, but also relatively good. This group consists of countries that showed comparatively robust economic, job vacancy and unemployment figures. Slovenia, for example, displayed a relatively weak economic and employment figures coupled with an average unemployment rate in comparison to other EU countries. However, the strong increase in job vacancies in this country (chart 1) improved the prospects for job seekers as the unemployed to job vacancies ratio moved from medium in the third quarter of 2010 to low in the same quarter in 2011. Prospects for job seekers also improved - though marginally - in Estonia, Sweden and the Czech Republic. In Denmark, there was a marginal deterioration of job prospects due to a decline in job vacancies in Denmark (see country special for more on Denmark).

Cyprus, Poland, Lithuania and Hungary had a medium ratio of unemployed to job vacancies in the third quarter of 2011. In fact, Cyprus moved from a low ratio in the third quarter of 2010 to a medium ratio in the third quarter of 2011, reflecting a deteriorating economic climate in that country. Lithuania and Hungary were characterised by a relatively high unemployment figure but improved economic and job vacancy figures, leading to a shift from a high unemployment to job vacancies ratio in the third quarter of 2010 to a medium ratio in the third quarter of 2011. For Poland, the opposite holds true (small deterioration), although its ratio still remained at medium level. The country was characterised by relatively strong economic and employment figures in the third quarter of 2011, but also experienced more difficulties on the labour market as the number of job vacancies fell (chart 1) and the number of unemployed increased.

Finally, labour market perspectives for job seekers were worst in countries with a high unemployed to job vacancies ratio in the third quarter of 2011. In Italy, Bulgaria, Ireland, Portugal, and Greece, the trend in the economic figures was relatively unfavourable and these countries faced relatively high unemployment figures, leading to weak and possibly



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deteriorating labour market perspectives for job seekers. Greece marked a severe deterioration in the ratio between the third quarter of 2011 and the third quarter of 2010, and there was a minor deterioration in Portugal and Bulgaria. In Italy and Ireland, job prospects increased marginally. According to the EC (2012), however, the poor economic conditions are likely to prevail in all five countries.

Lithuania, Latvia, Romania and Slovakia were characterised by relatively strong economic figures in the third quarter of 2011, but also relatively high unemployment figures, explaining the high and improved ratio of unemployed to job vacancies in these countries. For 2012, the EC (2012) expects further economic improvements in countries with better labour market perspective resulting in lower unemployment.

Ratio of unemployed to job-finders unchanged, differences per county

Similar to the ratio of unemployed to job vacancies, there was no substantial change in the ratio of unemployed to job-finders between the third quarter of 2010 and the third quarter of 2011 for Europe as a whole. In addition, the country pattern in the ratio in the third quarter of 2011 (chart 12) are similar to the pattern in the ratio of unemployed to job vacancies (chart 11). However, there were some exceptions such as the UK for which the ratio of unemployed to job-finders is relatively higher than the unemployment to job vacancies ratio, possibly indicating a reduced movement on the labour market as fewer people find jobs. By contrast the unemployed to job-finders ratio was substantially lower relative to the first ratio (chart 11) for Latvia and Denmark, where the lower ratio in Denmark most likely reflects the dynamic labour market (see country special).

The most substantial improvements (lower ratios) occurred in Romania, Estonia, Lithuania, Belgium and Portugal. However, the improvement of the ratio in the case of Portugal was most likely the result of increased job turnover.

The most substantial deterioration of the unemployed to job-finders ratio in the third quarter of 2011, in comparison to the third quarter of 2010, occurred in Greece. For the most part, this development signals an increasing unemployment figure underlining the deteriorating labour market conditions in that country. Slovakia also marked a substantial deterioration of the unemployed to job-finders ratio, but this is mainly due to disappointing job vacancy figures in the third quarter of 2011. Further deteriorations in the ratio - although less marked - were observed in Spain, Poland, the UK and Cyprus.

Looking at the PES data in Chart 13, on average for the 15 countries shown there were about 7 unemployed registered at PES at the end of the third quarter of 2011 for each newly registered job vacancy during that quarter. However, this ratio would tend to be high since many unemployed will register with PES, whereas only a proportion of all the job vacancies at any one time will be registered by PES.

The ratio of unemployed registered at PES to the inflow of PES registered job vacancies was highest for elementary occupations and clerks in the third quarter of 2011. The high ratio for elementary occupations reflects a relatively large group of unemployed previously occupied in elementary jobs and this is in line with a decrease in the hiring of lower-skilled (chart 14) and employment trends less favourable to the lower-skilled (see section VI). The ratio of skilled agriculture and fishery workers in the third quarter of 2011 reflects a seasonal effect arising from the increased demand for agricultural work in the summer months.

Chart 11: Ratio stock of unemployed to job vacancies
2011Q3, change compared to 2010Q3 in symbols

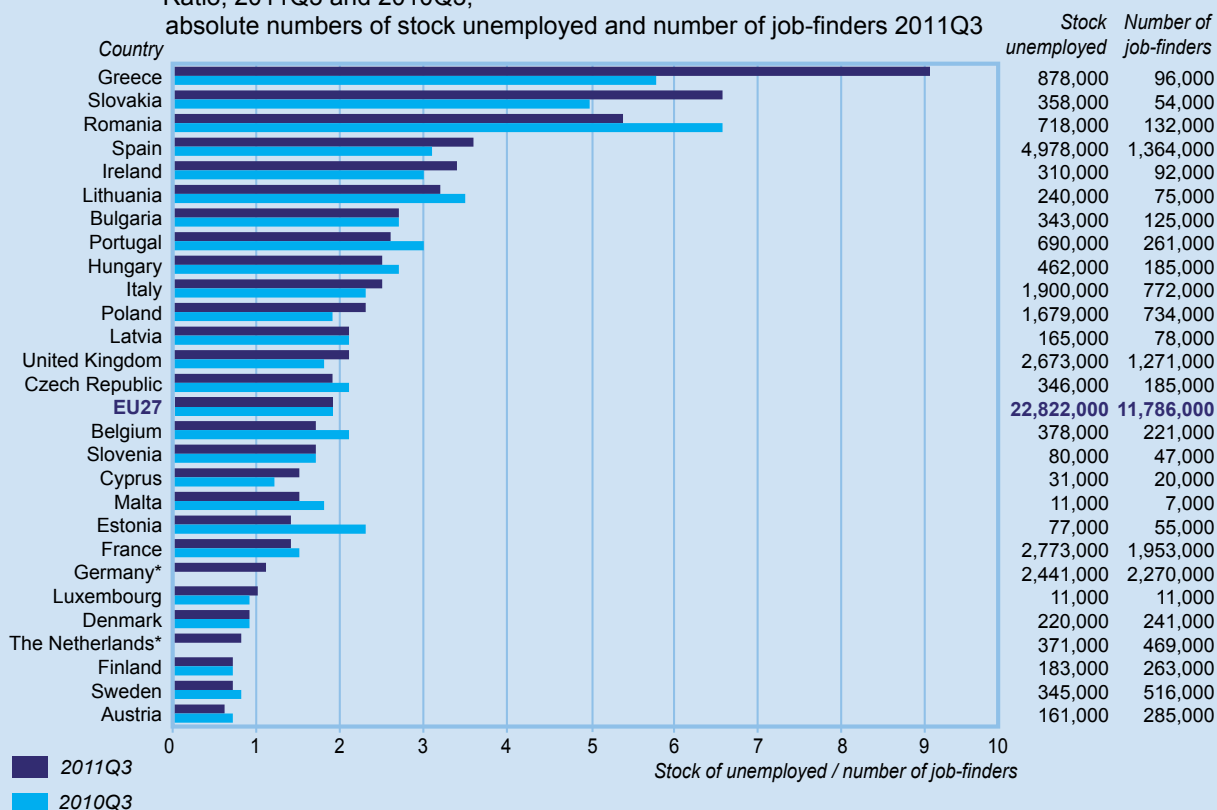
Ratio in 2011Q3	Country	
Very low (0 - 5)	Austria	—
	Germany ¹	▼
	Netherlands	—
	Luxembourg	—
Low (6 - 15)	UK	—
	Finland	—
	Sweden	▼
	Czech Republic	▼
	Slovenia	▼
	Denmark	▲
	Estonia	▲
Medium (16 - 30)	Cyprus	▲
	Poland ¹	▲
	Lithuania	▲
	Hungary	▼
High (31+)	Romania	▼
	Slovakia	▼
	Bulgaria	▲
	Portugal	▼
	Greece	▼
	Latvia	▼

▼ indicates a decreased ratio compared to 2010Q3 (improvement), — indicates an unchanged ratio and ▲ indicates an increased ratio (deterioration).

Source: Eurostat LFS and JVS data - own calculations (24 countries) ¹indicates that the stock of job vacancies is estimated, IAB estimation for 2010Q3 in Germany. Stock of unemployed: unadjusted, age 15-64. The ILO definition of unemployment is used. Exclusive Belgium, Greece, Malta and Spain (no data on unemployed and/or job vacancies at the time of analysis). Agriculture and the public sector are excluded from the stock of job vacancies. The ratio only indicates the development of tightness of the labour market over time. See Annex 3 for methodological notes.

Chart 12: Ratio stock of unemployed (LFS) to number of job-finders (LFS)

Ratio, 2011Q3 and 2010Q3,
absolute numbers of stock unemployed and number of job-finders 2011Q3



Source: EU LFS data - own calculations (27 countries), stock of unemployed: unadjusted, age 15-64

The ratio only indicates the development of tightness of the labour market over time. Job-finders were employees at the time of the survey and had been employed for a maximum of three months. The ILO definition of unemployment is used.

* For NL+DE the number of LFS non-responses in the job tenure, which is necessary to identify the number of job-finders, is very high in 2010Q3.

Chart 13: Stock of unemployed PES / inflow job vacancies PES in EU by occupational group (ISCO)

Ratio, 2011Q3



Source: PES - own calculations (15 countries). ISCO-88 and ISCO-08 1 digit level combined.

Countries included: Austria, Belgium, Cyprus, Czech Republic, Germany, Hungary, Estonia, Spain, Lithuania, Latvia, the Netherlands, Portugal, Sweden, Slovenia and Slovakia.

The ratio between the stock number of registered unemployed at PES and the inflow of PES registered job vacancies indicates labour market shortage or surplus. The higher the ratio, the less labour market shortage and vice versa.

VI. EDUCATION AND SKILLS

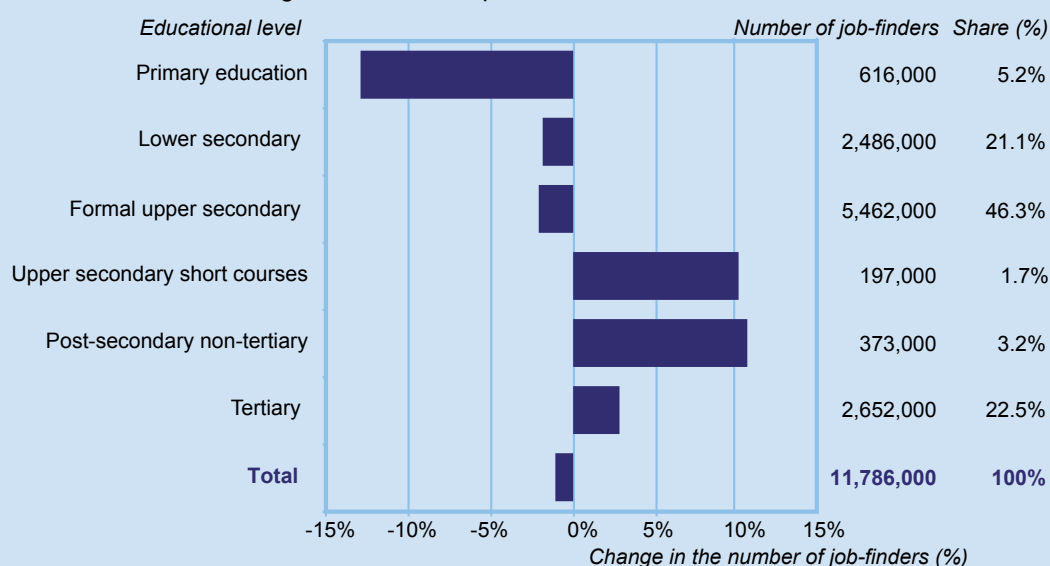
Developments in hiring favour the higher-skilled

Growth in the number of job-finders by educational level (not the job vacancies they applied for) between the third quarter of 2010 and the third quarter of 2011 is most pronounced for those with higher level qualifications (Chart 14). In particular, the number of job-finders with an education level of upper secondary short courses and post-secondary, non-tertiary courses increased substantially (+10% and +11% respectively). This growth may reflect an increased incidence of discouraged workers who took up courses to improve their chances on the labour market and consequently found a job. Although growth in higher-skilled job-finders was strong, the absolute number of job-finders in these groups was relatively low at 1.7% and 3.2% of all job-finders in the third quarter of 2011 respectively.

In the third quarter of 2011, the number of job-finders with a tertiary level of educational attainment is substantially higher: the 2.6 million job-finders in this group account for approximately 22.5% of all job-finders. More importantly, this figure was +3% higher in the third quarter of 2011 than it was in the third quarter of 2010, underlining the increasingly important role education plays in labour market success. This is in line with the growth in hiring of 'legislators, senior officials and managers' and 'professionals' (chart 7).

Conversely, the number of job-finders with primary education level education decreased (-13%), as did the number of job-finders with a lower secondary (-2%) and an upper secondary education (-2%). These figures do not appear to correspond with the growth in elementary occupations (chart 7). However, the growth in hiring in elementary occupations reflects job-turnover in manufacturing. In addition, hiring in other lower-skilled occupations, such as craft and related trades workers and plant and machine operators and assemblers, was in decline in the third quarter of 2011. Moreover, the decrease in hiring of lower-skilled in contrast to the increased hiring of higher-skilled workers corresponds to long-term employment trends which tend to favour the higher-skilled, indicating that the increased hiring of this group is not likely to be due to job turnover. More precisely, the share of employed with tertiary education was approximately 25% in 2005 (Eurostat) but by 2011 this percentage increased to 30%. While the share of employed with a middle level education remained more or less constant, the share of employed with pre-primary, primary and lower secondary education decreased from 25% to 21% in the same period. This suggests that job opportunities for higher qualified job seekers are therefore on the rise, while job opportunities for the lower qualified are decreasing.

Chart 14: Change in the number of job-finders in EU by educational level (ISCED)
Percentages, 2011Q3 compared to 2010Q3, absolute numbers of 2011Q3



Source: EU LFS data - own calculations (27 countries).

Job-finders were employees at the time of the survey and had been employed for a maximum of three months.



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VII. COUNTRY SPECIAL: DENMARK

The Europe 2020 strategy promotes labour market reforms combining flexibility of the labour market with security (flexicurity). More specifically, flexible and reliable contractual arrangements, a comprehensive lifelong learning strategy and effective active labour market policies are combined with a modern social security system. The basis for flexicurity is to promoting the efficient allocation of labour by allowing the free movement of workers between jobs, thereby better responding to demand. Flexibility allows employers to rapidly adapt to changing markets, while security and job mobility allow workers to take on new skills, in combination with adequate unemployment benefits when the labour market fails to deliver a suitable employment opportunity.

Perhaps the most discussed example of the flexicurity concept in practice is the Danish model. Denmark is characterised by relatively low employment protection legislation (EPL), exemplified by the relatively short dismissal notice periods and relatively low severance payments made to displaced workers.

This is countered by a relatively generous unemployment benefits (although including a ceiling for higher income groups). A third element in the Danish approach is to provide the unemployed with the right to a high level of customised support through counselling, job training or subsidised employment (See Andersen (2011)).

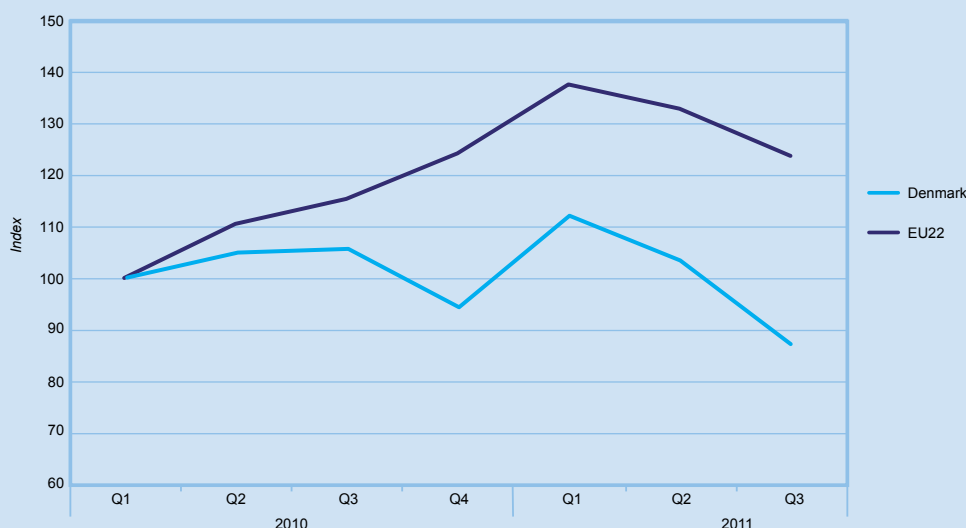
Labour market in decline

As the European economy slowed down in the third and fourth quarters of 2011 the Danish labour market reacted strongly to the downturn in comparison to other European countries. Employment in Denmark fell quite severely, evidenced by the year-on-year growth figures of the number of employees which were negative throughout 2011. However, according to Andersen (2011), this is to be expected in a country with low employment protection. In other countries with more rigid EPL the effect is more likely to lead to a reduction in the number of working hours to adjust labour costs, rather than simply cutting the number of employees.

In 2011 the development in job vacancies in Denmark was less positive than in 22 other European countries (chart D1). In 2011, job vacancy year-on-year quarterly figures were falling in Denmark: from +12% in the first quarter to -1% in the second quarter to -17% in the third quarter. In contrast, the number of job vacancies picked up in many other countries, including neighbouring countries such as Sweden, Norway and Germany.

Figures on the inflow of job vacancies registered with PES show a similar - if not worse - picture of job vacancy development in Denmark (chart D2). In 10 other EU countries shown in chart 10, the inflow of PES job vacancies slowly increased after the initial fall as a result of the financial crisis in the third quarter of 2008. In contrast, the PES inflow of job vacancies in Denmark has been declining steadily.

Chart D1: Development of job vacancies in Denmark and the EU
Index, 2010Q1 - 2011Q3, 2010Q1=100



Source: Eurostat (JVS) - own calculations. Excluding agriculture and the public sector. Countries included in EU22 average: Austria, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, United Kingdom.

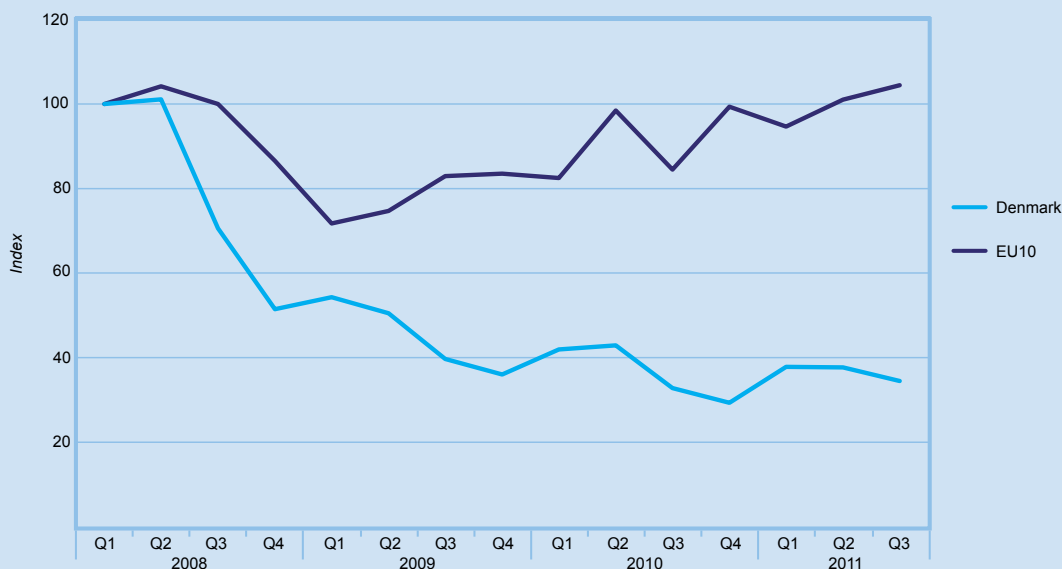


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Chart D2: Development inflow of PES job vacancies in Denmark and EU
Index, 2008Q1 - 2011Q3, 2008Q1=100



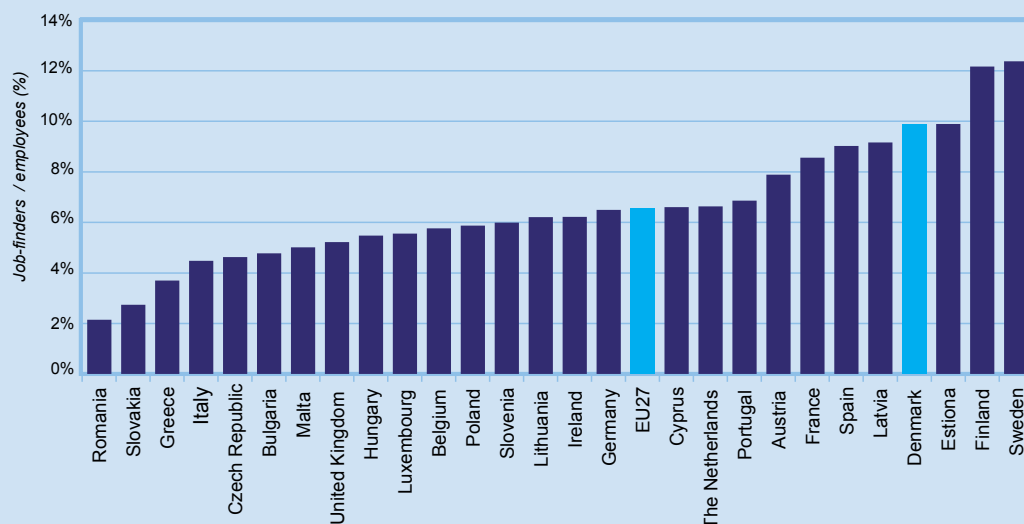
Source: PES data - own calculations. Countries included in EU10 average: Austria, Germany, Estonia, Finland, Lithuania, Latvia, Portugal, Sweden, UK, Ireland. Inflow of PES registered job vacancies refers to new vacancies which have been registered in a certain quarter.

High job mobility in Denmark

A high degree of labour market flexibility should result in more hirings and firings and therefore should show a higher share of job-finders when dividing the number of job-finders

in the third quarter of 2011 by the number of employees for 27 European countries. Chart D3 reveals that this is in fact the case in Denmark. Here there are around 10 employees per job-finder, whereas there are about 15 employees per job-finder in the EU27 on average.

Chart D3: Percentage job-finders to employees in Denmark and EU
Percentage, 2011Q3



Source: LFS data - own calculations (27 countries).

Job-finders were employees at the time of the survey and had been employed for a maximum of three months.



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Low share of temporary work

Although labour mobility would appear to be relatively high in Denmark because of the large share of job-finders, the share of temporary employees is relatively low. Eurostat reports that the share of employees with temporary contracts is 8.5% in Denmark, whereas it is 13.9% in the EU27. A similar discrepancy is observed when looking at job-finders. In the third quarter of 2011, the share of job-finders with a temporary job was 31% in Denmark, while this percentage was 64% for the EU27. It is possible that to a certain extent low employment protection in Denmark might account for the low share of temporary contracts, because permanent contracts can be ended relatively easily, thereby reducing the need for temporary contracts. However, the incidence of seasonal work might also be a factor in such comparisons with other countries where temporary contracts are more in demand.

Upward trend in labour demand in industry

Although job vacancies in general in Denmark have been decreasing since 2010, the number of job vacancies has been growing in the industry sector (Chart D4). In the third quarter of 2011, job vacancies in that sector made up about 20% of all job vacancies and the year-on-year growth figure was +9%. This positive development seems to be in line with the employer survey carried out by the Danish national statistical office (Statistics Denmark). The sentiment in the industry sector for the next three months (from February 2012) is positive (+9), whereas sentiment in the trade and in services are negative (-2 and -4). Sentiment is the worst in construction (-24), where job vacancies have not been growing except for the first quarter of 2011.

Chart D4: Stock of job vacancies by Sector

	2010Q1	2010Q2	2010Q3	2010Q4	2011Q1	2011Q2	2011Q3
Total	19094	20019	20150	17988	21378	19727	16625
Industry	2854	2678	3152	2892	3336	3816	3398
Construction	1362	1727	1273	813	2532	1136	1036
Trade and transport etc.	7857	8262	7743	5973	7498	7376	6084
Information and communication	1666	1600	1763	1469	1848	1681	1749
Financial, insurance and real estate	1422	1040	850	1186	1338	1070	800
Other business services	3933	4712	5370	5655	4827	4648	3558

Source: Statistics Denmark

Development in PES job vacancies more positive for industry-related occupations and professionals

The inflow of PES job vacancies shows a decline in general since the third quarter of 2008 (chart D2). However, the development is not similar for all occupational groups, as the decrease in the inflow of PES job vacancies for industrial occupations is slowing down. More specifically, the inflow of job vacancies for craft and trade related workers, plant and machine operators and assemblers and elementary occupations was more positive than the average of all occupations. The development of PES inflows of job vacancies for professionals was also less negative than others. However, overall between the third quarter of 2008 and the third quarter of 2011, the downward trend has been most pronounced for technicians and associate professionals.

Hirings increase in industry-related occupations and for professionals...

When looking at hirings, the same pattern obtains. In the third quarter of 2011 compared to the third quarter of 2010, the number of job-finders was +41% higher for craft and trades related workers, +35% higher for plant and machine operators and assemblers and +15% higher for elementary occupations. As employment figures in industry increase (Eurostat), the increase in hirings for these occupations is mostly likely the result of job creation. The number of job-finders as professionals increased by +42% in the third quarter of 2011, while the number of job-finders as technicians and associate professionals decreased by -36%.



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Job opportunities by Danish Labour Market Balance

The Danish 'labour market balance' (Arbejdsmarkedsbalancen) is a forecasting tool that uses approximately 1.100 job titles as the basis of an employer survey to identify job opportunities in each of the four employment regions in Denmark. Supply and demand comparisons are calculated by the national labour market authority (Arbejdsmarkedsstyrelsen, part of the Ministry of Employment in Denmark) with regional quantitative data, including information on corporate recruitment plans, unemployment, employment and job openings. The semi-annual survey covers 14,000 Danish companies (representing approximately 50% of total employment).

The labour market balance supports job centers, unemployment funds and other employment policy actors to guide and advise on the availability of employment opportunities in the regions. The balance sheet information contributes to targeted job search and other offerings in areas with the best job opportunities. The job opportunities are categorized into the categories of 'excellent', 'good' and 'less good' (chart D5). Excellent job opportunities include jobs where companies have sought in vain for employees, indicating better labour market perspectives for job seekers with the right qualifications.

In the northern region of Denmark the labour market balance of spring 2012 shows there are excellent job opportunities for 'serving employees', 'agricultural workers' and 'cleaners', due to skills mismatch between labour demand

and supply for these occupations. Other 'excellent job opportunities' are due to shortages of labour, such as specialised sewing workers (i.e. textiles) in the Hovedstaden-Sjælland region of Denmark.

'Good job opportunities' include jobs where supply and demand are in balance because there are plenty of job vacancies and plenty of unemployed to fill them. Employers manage to fill these job vacancies quite well and there are good opportunities for job seekers, although finding a job might take some time and may require widening the geographical scope of the job search. 'Good job opportunities exist for 'sales, purchasing and marketing' jobs and for 'guard, security and monitoring' in the Central Jutland region.

'Less good job opportunities' includes jobs with high unemployment and few job vacancies. Finding a job in such circumstances is difficult, even after a long search period in a wider geographical area. Many job opportunities are currently classified as 'less good', such as 'iron, metal and auto' in the Danish region Copenhagen & Zealand.

In an additional question in the survey, employers are asked to indicate whether the company had unsuccessfully tried to recruit new employees. Aggregating the results of this question results in a top 12 of bottleneck occupations in Denmark (Chart D6). The number one bottleneck occupation in March is sales consultant, followed by shop assistant and masonry. The higher skilled occupations IT consultant and accountant make up number 9 and 12 of the list.

Chart D5. Classification of job opportunities in the Danish Labour Market Balance

Labour market balance	Examples	Regions
Excellent job opportunities <i>Shortage of labour supply/ difficult to fill job vacancies</i>	Database developer IT Electro power engineering Machine operator	Central Jutland, Copenhagen & Sealand Central Jutland, Southern Denmark Northern Jutland
Good job opportunities <i>Balance between supply and demand of labour</i>	Agricultural economist Ambulance driver Call centre employee	All regions All regions Central Jutland, Copenhagen & Sealand, Southern Denmark
Less good job opportunities <i>Surplus labour supply</i>	Researcher, recruitment Webdesigner Bank Clerk	Central Jutland, Northern Jutland, Southern Denmark Central Jutland, Northern Jutland Central Jutland, Northern Jutland, Southern Denmark

Source: Pixi manual



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Chart D6: Top 12 list of the major bottleneck occupations in Denmark in march 2011

Ref. Nr	Occupation	Industry
1	Sales Consultant	Sales, purchasing and marketing
2	Shop Assistant	Sales, purchasing and marketing
3	Masonry	Construction
4	Serving Employee	Hotel, restaurant, kitchen, canteen
5	Cook/Chef	Hotel, restaurant, kitchen, canteen
6	Cleaning Assistant	Cleaning, property maintenance and renovation
7	Construction Painter	Construction
8	Agriculture Assistant	Agriculture, forestry, horticulture, fisheries and animal care
9	IT Consultant	IT and telecommunications technology
10	Scaffolding Engineer	Construction
11	Carpentry	Construction
12	Accountant and Accounts Assistant	Administration, Accounting and Finance

Source: Danish biannual survey on the recruitment situation as experienced by the companies

For more information on the Danish labour market balance, please visit: www.ams.dk/balance

VIII. MOST DEMANDED OCCUPATIONS PER COUNTRY

VIII.1. Top 10 growth occupations, per country (LFS job-finders, 2011Q2 - 2011Q3), absolute numbers, absolute growth and growth rate in %

How to read the table

The top 10 is based on the 3-digit ISCO-08 classification of occupations. The top 10 is determined by the absolute growth of the number of job-finders. The occupations are presented with absolute numbers of the second quarter of 2011, the absolute growth between the second quarter of 2011 and the third quarter of 2011 and the growth rate. For example (384400 + 95600 = 25%) means that the number

of job-finders increased from 384,400 in second quarter of 2011 to 480,000 in the third quarter of 2011: this is an increase of 95600 job-finders or +25%. If the occupation is presented without numbers, this means that all numbers are too small for presentation.

. = number too small for presentation

* = number with limited reliability

EU24	1. Waiters and bartenders (384400 + 95600 = 25%) 2. Shop salespersons (606900 + 83200 = 14%) 3. Personal care workers in health services (274500 + 78700 = 29%) 4. Manufacturing labourers (254800 + 53400 = 21%) 5. Transport and storage labourers (233200 + 50900 = 22%) 6. Material-recording and transport clerks (141400 + 50000 = 35%) 7. Sports and fitness workers (59900 + 41400 = 69%) 8. Protective services workers (125500 + 40700 = 32%) 9. Physical and engineering science technicians (134600 + 37200 = 28%) 10. Cooks (160300 + 32900 = 21%)
Austria	1. Waiters and bartenders (13800 + 7600* = 55%*) 2. General office clerks (9900 + 5800* = 59%*) 3. Shop salespersons (17500 + . = .%) 4. Machinery mechanics and repairers 5. Blacksmiths, toolmakers and related trades workers 6. Personal care workers in health services 7. Physical and engineering science technicians (7800* + . = .%) 8. Legal, social and religious associate professionals 9. Other clerical support workers 10. Building and housekeeping supervisors
Belgium	1. Personal care workers in health services (. + 3500* = .%) 2. Physical and engineering science technicians (. + 3200* = .%) 3. Sales and purchasing agents and brokers (. + 3100* = .%) 4. Child care workers and teachers' aides (3100* + 2900* = 91%*) 5. Cashiers and ticket clerks (. + 2500* = .%) 6. Business services and administration managers 7. General office clerks (8800 + . = .%) 8. Food preparation assistants (3500* + . = .%) 9. Process control technicians 10. Food and related products machine operators
Bulgaria	1. Cashiers and ticket clerks 2. Food preparation assistants 3. Mining and construction labourers 4. Blacksmiths, toolmakers and related trades workers 5. Manufacturing labourers 6. Mobile plant operators 7. Waiters and bartenders (5800* + . = .%) 8. Building and housekeeping supervisors 9. Travel attendants, conductors and guides 10. Building finishers and related trades workers
Cyprus	1. General office clerks 2. Cooks 3. Travel attendants, conductors and guides 4. Shop salespersons (1300* + . = .%) 5. Secretaries (general) 6. Sales and purchasing agents and brokers 7. Cashiers and ticket clerks 8. Building finishers and related trades workers 9. Sports and fitness workers 10. Other elementary workers



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Czech Republic	1. Shop salespersons (11900 + 3900* = 33%*) 2. Cashiers and ticket clerks (2300* + 1600* = 70%*) 3. Physical and engineering science technicians (2500* + 1600* = 65%*) 4. Sales and purchasing agents and brokers (3500* + 1500* = 44%*) 5. Other teaching professionals (. + 1500* = .%) 6. Personal care workers in health services (1000* + 1400* = 148%*) 7. Material-recording and transport clerks (2700* + 1400* = 51%*) 8. Transport and storage labourers (1700* + 1300* = 74%*) 9. Other clerical support workers (1700* + 1100* = 67%*) 10. Primary school and early childhood teachers (1300* + 1000* = 76%*)
Germany	1. Material-recording and transport clerks (39900 + 32400 = 81%) 2. Manufacturing labourers (85300 + 27800 = 33%) 3. Shop salespersons (132100 + 25500 = 19%) 4. Personal care workers in health services (40800 + . = .%) 5. General office clerks (70400 + . = .%) 6. Legal, social and religious associate professionals (42700 + . = .%) 7. Blacksmiths, toolmakers and related trades workers (32800 + . = .%) 8. Protective services workers 9. Hairdressers, beauticians and related workers 10. Other health associate professionals
Denmark	1. Domestic, hotel and office cleaners and helpers (5700* + 4700* = 82%*) 2. Building finishers and related trades workers 3. Manufacturing labourers 4. Shop salespersons (12000 + . = .%) 5. Painters, building structure cleaners and related trades workers 6. Building and housekeeping supervisors 7. Personal care workers in health services (14200 + . = .%) 8. Other elementary workers (5500* + . = .%) 9. Other sales workers (4600* + . = .%) 10. Engineering professionals (excluding electrotechnology)
Estonia	1. Building frame and related trades workers 2. Painters, building structure cleaners and related trades workers 3. Building finishers and related trades workers 4. Manufacturing labourers 5. Domestic, hotel and office cleaners and helpers 6. Shop salespersons 7. Waiters and bartenders 8. Keyboard operators 9. Personal care workers in health services 10. Manufacturing, mining, construction, and distribution managers
Spain	1. Waiters and bartenders (91400 + 29100 = 32%) 2. Transport and storage labourers (28500 + 21300 = 75%) 3. Personal care workers in health services (37600 + 18800 = 50%) 4. Shop salespersons (69700 + 17000 = 24%) 5. Protective services workers (20700 + 13500 = 65%) 6. Cooks (30700 + 7600 = 25%) 7. Sports and fitness workers (10100 + 7200 = 71%) 8. Other clerical support workers (2700* + 5500 = .%) 9. Cashiers and ticket clerks (14700 + 5400 = 37%) 10. Mobile plant operators (11900 + 4900* = 41%*)
Finland	1. Building frame and related trades workers (9700 + 4600 = 47%) 2. Other clerical support workers (2000* + 2700* = 133%*) 3. Personal care workers in health services (14600 + 2400* = 16%*) 4. Waiters and bartenders (. + 2100* = .%) 5. Primary school and early childhood teachers 6. Other teaching professionals 7. Car, van and motorcycle drivers 8. Other sales workers (7200 + . = .%) 9. Mining and construction labourers (3200* + . = .%) 10. Street and market salespersons
France	1. Mining and construction labourers (58700 + 27300 = 46%) 2. Shop salespersons (85700 + 25600 = 30%) 3. Transport and storage labourers (52400 + 23200 = 44%) 4. Sports and fitness workers (29700 + 18700* = 63%*) 5. Waiters and bartenders (45400 + 17100* = 38%*) 6. Agricultural, forestry and fishery labourers (32000 + 15600* = 49%*) 7. Sales and purchasing agents and brokers (40300 + 15500* = 38%*) 8. Domestic, hotel and office cleaners and helpers (127900 + 15400* = 12%*) 9. Personal care workers in health services (42600 + 13700* = 32%*) 10. Cooks (22900 + 13400* = 58%*)
Greece	1. Cooks (2600* + . = .%) 2. Machinery mechanics and repairers 3. Garment and related trades workers 4. Refuse workers 5. Car, van and motorcycle drivers 6. Finance professionals 7. Cashiers and ticket clerks 8. Heavy truck and bus drivers 9. Transport and storage labourers 10. Personal care workers in health services
Hungary	1. Agricultural, forestry and fishery labourers (10500 + . = .%) 2. Physical and engineering science technicians 3. Financial and mathematical associate professionals 4. Business services agents 5. Manufacturing labourers (2900* + . = .%) 6. Sales and purchasing agents and brokers 7. Child care workers and teachers' aides 8. Regulatory government associate professionals 9. Primary school and early childhood teachers 10. Rubber, plastic and paper products machine operators
Italy	1. Waiters and bartenders (46500 + 29000 = 62%) 2. Shop salespersons (49700 + 8400 = 17%) 3. Secondary education teachers (. + 7600 = .%) 4. Protective services workers (10700 + 6700* = 62%*) 5. Sheet and structural metal workers, moulders and welders, and related workers (9700 + 5100* = 53%*) 6. Cashiers and ticket clerks (8000 + 4600* = 58%*) 7. Physical and engineering science technicians (10300 + 4500* = 44%*) 8. Medical doctors (. + 4400* = .%) 9. Nursing and midwifery associate professionals 10. Process control technicians
Lithuania	1. Mining and construction labourers 2. Mobile plant operators 3. Building finishers and related trades workers 4. Electronics and telecommunications installers and repairers 5. Numerical clerks 6. Other clerical support workers 7. Domestic, hotel and office cleaners and helpers 8. Machinery mechanics and repairers 9. Food processing and related trades workers 10. Other stationary plant and machine operators
Luxembourg	1. Administration professionals 2. Shop salespersons 3. Finance professionals 4. Waiters and bartenders 5. Social and religious professionals 6. Rubber, plastic and paper products machine operators 7. Machinery mechanics and repairers 8. Client information workers 9. Cooks 10. Material-recording and transport clerks
Latvia	1. Shop salespersons 2. Manufacturing labourers (6100* + . = .%) 3. Administration professionals 4. Financial and mathematical associate professionals 5. Transport and storage labourers 6. Agricultural, forestry and fishery labourers (5700* + . = .%) 7. Sheet and structural metal workers, moulders and welders, and related workers 8. Electrical equipment installers and repairers 9. Other elementary workers 10. Hairdressers, beauticians and related workers
Malta	1. Waiters and bartenders 2. Other teaching professionals 3. Artistic, cultural and culinary associate professionals 4. Other elementary workers 5. Numerical clerks 6. Manufacturing labourers 7. Finance professionals 8. Child care workers and teachers' aides 9. Assemblers 10. Market gardeners and crop growers



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The Netherlands	1. Cashiers and ticket clerks (9900* + 5700* = 58%) 2. Waiters and bartenders (30600 + . = .%) 3. Domestic, hotel and office cleaners and helpers (17600 + . = .%) 4. Transport and storage labourers (29100 + . = .%) 5. Personal care workers in health services (13100 + . = .%) 6. Legal, social and religious associate professionals (7000* + . = .%) 7. Manufacturing labourers (6300* + . = .%) 8. Cooks 9. Other sales workers 10. Secondary education teachers
Poland	1. Hairdressers, beauticians and related workers 2. Manufacturing labourers (22700 + . = .%) 3. Car, van and motorcycle drivers (8300* + . = .%) 4. Primary school and early childhood teachers 5. Waiters and bartenders (9200* + . = .%) 6. Physical and engineering science technicians (9000* + . = .%) 7. Mining and mineral processing plant operators 8. Sheet and structural metal workers, moulders and welders, and related workers (11400* + . = .%) 9. Social and religious professionals 10. Sports and fitness workers
Portugal	1. Domestic, hotel and office cleaners and helpers (17900 + . = .%) 2. Protective services workers 3. Other sales workers 4. Building finishers and related trades workers 5. Cashiers and ticket clerks 6. Heavy truck and bus drivers 7. Personal care workers in health services 8. Manufacturing labourers 9. Sports and fitness workers 10. Car, van and motorcycle drivers
Romania	1. Cooks 2. Transport and storage labourers 3. Other elementary workers 4. Food processing and related trades workers 5. Waiters and bartenders 6. Client information workers 7. Other sales workers 8. Personal care workers in health services 9. Primary school and early childhood teachers 10. Engineering professionals (excluding electrotechnology)
Sweden	1. Personal care workers in health services (60200 + 20200 = 34%) 2. Shop salespersons (29300 + 6900 = 24%) 3. Waiters and bartenders (9500 + 4200* = 45%*) 4. Physical and engineering science technicians (4700* + . = .%) 5. Transport and storage labourers (4300* + . = .%) 6. Primary school and early childhood teachers (9100 + . = .%) 7. Street and market salespersons 8. Secondary education teachers 9. Other teaching professionals 10. Food preparation assistants (14400 + . = .%)
Slovenia	1. Waiters and bartenders (2100* + 2300* = 108%*) 2. Manufacturing labourers (. + 1600* = .%) 3. Secretaries (general) (. + 1400* = .%) 4. Food preparation assistants (. + 1000* = .%) 5. Cooks 6. Vehicle, window, laundry and other hand cleaning workers 7. Cashiers and ticket clerks 8. Primary school and early childhood teachers 9. Agricultural, forestry and fishery labourers 10. Assemblers (1300* + . = .%)

VIII.2. Top 5 new registered job vacancies of PES, per country (inflow 2011Q3), ISCO-88 4 digit level

Occupation	Inflow of job vacancies in 2011Q3
EU13	
Shop, stall and market salespersons and demonstrators	85,352
Hand packers and other manufacturing labourers	66,990
Waiters, waitresses and bartenders	36,894
Finance and sales associate professionals not elsewhere classified	34,783
Stock clerks	34,747
Austria	
Housekeepers and related workers	9,340
Shop, stall and market salespersons and demonstrators	8,606
Waiters, waitresses and bartenders	7,945
Freight handlers	5,862
Hand packers and other manufacturing labourers	5,654
Belgium	
Shop, stall and market salespersons and demonstrators	14,292
Secretaries	9,246
Domestic helpers and cleaners	5,751
Assembling labourers	5,519
Helpers and cleaners in offices, hotels and other establishments	4,839
Cyprus	
Farm-hands and labourers	768
Domestic helpers and cleaners	244
Cooks	208
Helpers and cleaners in offices, hotels and other establishments	199
Waiters, waitresses and bartenders	193



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Denmark	
Door-to-door and telephone salespersons	1,768
Institution-based personal care workers	1,757
Helpers and cleaners in offices, hotels and other establishments	1,679
Shop, stall and market salespersons and demonstrators	1,405
Pre-primary education teaching associate professionals	1,253
Finland	
Finance and sales associate professionals	25,775
Shop, stall and market salespersons and demonstrators	7,208
Building caretakers, window and related cleaners	6,228
Housekeeping and restaurant services workers	3,446
Metal moulders, welders, sheet-metalworkers, structural-metal preparers and related trades workers	3,319
Germany	
Hand packers and other manufacturing labourers	40,157
Finance and sales associate professionals not elsewhere classified	29,267
Stock clerks	27,102
Other office clerks	24,060
Shop, stall and market salespersons and demonstrators	20,658
Lithuania	
Assembling labourers	4,821
Shop, stall and market salespersons and demonstrators	2,913
Freight handlers	2,820
Heavy truck and lorry drivers	2,259
Painters and related workers	1,479
Luxembourg	
Building construction labourers	334
Waiters, waitresses and bartenders	285
Computing professionals not elsewhere classified	253
Cooks	238
Domestic helpers and cleaners	237
The Netherlands	
Other machine operators not elsewhere classified	3,503
Shop, stall and market salespersons and demonstrators	2,360
Helpers and cleaners in offices, hotels and other establishments	2,329
Waiters, waitresses and bartenders	1,674
Technical and commercial sales representatives	1,603
Portugal	
Manufacturing labourers	2,947
Cooks	2,417
Waiters, waitresses and bartenders	1,473
Shop, stall and market salespersons and demonstrators	1,413
Helpers and cleaners in offices, hotels and other establishments	1,370
Romania	
Hand packers and other manufacturing labourers	16,511
Shop, stall and market salespersons and demonstrators	7,149
Building construction labourers	6,085
Freight handlers	4,009
Heavy truck and lorry drivers	3,214
Slovakia	
Protective services workers not elsewhere classified	571
Metal wheel-grinders, polishers and tool sharpeners	482
Statistical and finance clerks	429
Housekeepers and related workers	416
Computer equipment operators	406



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Sweden

Shop, stall and market salespersons and demonstrators	19,084
Technical and commercial sales representatives	15,664
Stall and market sales persons	6,430
Helpers and cleaners in offices, hotels and other establishments	5,210
Home-based personal care workers	4,789

VIII.3. Top 5 in the EURES Job Mobility Portal

- 1) Shop salespersons and demonstrators

The UK	28,700 Vacancies
Germany	11,200 Vacancies
Belgium	5,300 Vacancies
- 2) Finance and sales associate professionals

The UK	27,000 Vacancies
France	4,000 Vacancies
Italy	3,200 Vacancies
- 3) Housekeeping and restaurant services workers

Germany	18,100 Vacancies
Austria	8,100 Vacancies
France	5,300 Vacancies
- 4) Electrical and electronic equipment mechanics and fitters

Germany	26,900 Vacancies
The UK	8,400 Vacancies
Austria	1,600 Vacancies
- 5) Modern health associate professionals

The UK	19,000 Vacancies
Germany	11,700 Vacancies
Belgium	3,400 Vacancies

Based on figures of the EURES Job Mobility Portal on 2 April 2012

For more information, see the European job Mobility Bulletin No.6

ANNEX A1 REFERENCES

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ABBREVIATIONS, DEFINITIONS

Country abbreviations

AT	Austria	IT	Italy
BE	Belgium	LV	Latvia
BG	Bulgaria	LT	Lithuania
CY	Cyprus	LU	Luxembourg
CZ	Czech Republic	MT	Malta
DK	Denmark	NL	The Netherlands
EE	Estonia	NO	Norway
ES	Spain	PL	Poland
FI	Finland	PT	Portugal
FR	France	RO	Romania
DE	Germany	SK	Slovakia
GR	Greece	SI	Slovenia
HU	Hungary	SE	Sweden
IE	Ireland	UK	United Kingdom

Other abbreviations

EJMB	European Job Mobility Bulletin
EVM	European Vacancy Monitor
EURES	EUropean Employment Services
ISCED	International Standard Classification of Education (1, 2 = primary, lower secondary, 3, 4 = upper, post-secondary, 5 and 6 = tertiary education)
ISCO	International Standard Classification of Occupations
NACE	Classification of Economic Activities in the European Community
JVS	Job Vacancy Statistics (EUROSTAT)
LFS	Labour Force Survey (EUROSTAT)
PES	Public Employment Services
Q1	First quarter of the year
TAW	Temporary Agency Work(er)
TWA	Temporary Work Agency

ANNEX 3: DEFINITIONS AND CONCEPTS

Job vacancies

The official definition of a job vacancy is included in Article 2 of Regulation (EC) No 453/2008 and is used by EUROSTAT. A job vacancy shall mean a paid post that is newly created, unoccupied, or about to become vacant: a) for which the employer is taking active steps and is prepared to take further steps to find a suitable candidate from outside the enterprise concerned, and b) which the employer intends to fill either immediately or within a specific period of time. This is a 'stock' number.

Job-finders

Job-finders are employees who are employed in a 'reference week' of that quarter and have started their job in a month, or, at most, three months earlier than the month of the 'reference week'. The number of job-finders is calculated quarterly using the EU Labour Force Survey supplied by Eurostat.

Stock, inflows and outflows

A 'stock' number is a statistical term measuring a variable at a certain moment in time. For example, the number of job vacancies available in Germany at 1 January 2011. A 'flow' number is measured in a period of time. For example, the 'inflow' is the number of new vacancies in the first six months of January. This number is always higher than the stock number, because some vacancies are immediately filled and others are withdrawn.

Job vacancy reach or market reach

The job vacancy reach or market reach of a recruitment channel (for example the PES) is the number of job vacancies that has been reported in this channel, compared to the total number of job vacancies in the total labour market. This can be stock, inflow or outflow information.

Job vacancy share or market share

The job vacancy share or market share of a recruitment channel (for example a PES) is the number of job vacancies that has been filled by the specific channel, set off against the total number of filled job vacancies in the labour market. By definition, this is outflow information.

Educational field

The classification of educational field is based on the international standard. This standard is the two-digit ISCED-97 classification to which Eurostat adds a third digit level for a more flexible system. The LFS data by educational field are generally presented at the one-digit ISCED-97 aggregate level. Only for science, mathematics and computing, and military and defence, the LFS data are presented at a more detailed level.

GDP

Gross domestic product in volumes, not seasonally adjusted. Measured in millions of euro, chain-linked volumes, reference year 2005 (at 2005 exchange rates). Source: Eurostat.



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Methodological notes on job vacancy statistics (JVS) - Eurostat

Data on the stock of job vacancies are collected by the national statistical offices in almost all EU countries. In some countries they are collected by the Ministry of Labour. Most countries collect the data by means of surveys, except Luxembourg, the Czech Republic and Slovenia which collect the data by means of administrative data. Also, the sampling unit is the enterprise in most countries, but the local unit in nine countries: Denmark, France, Finland, Germany, Spain, the Netherlands, Poland, Portugal and Sweden. In those nine countries, enterprises are not approached at the corporate level, but a sample of local branches is approached to fill in the survey. These differences need to be born in mind when comparing stocks of vacancies between countries.

Another major difference between countries is that in some countries data are not collected for certain sectors or small companies. No data are collected for the agriculture sector in ten countries: Austria, Cyprus, Denmark, Spain, France, Greece, Ireland, Italy, Portugal and UK. For the other countries, the number of agriculture vacancies comprises 1% of all vacancies or less in most West European countries, 2% in Germany and between 2% and 3% in new Member States. Agriculture is excluded from the analysis for international comparability and because the impact of agriculture on the total level is small.

For the public administration, data on job vacancies are not collected in six countries: Denmark, France, Greece, Italy, Poland and Portugal. In Denmark and Italy and data for the public sector including education and healthcare are not collected at all. To represent vacancy developments as fully as possible, Chart 1 presents data all available data inclusive the whole public sector (NACE O to S) where possible and exclusive the public sector else. In Spain, vacancy data for the public administration started to be collected in 2010Q1 creating a break in the series. For this reason, Spain is excluded from the analysis.

For small enterprises, defined as having less than 10 employees, no job vacancy data are collected in France, Italy and Malta. France only collects it on an annual basis. For international comparability the stock of vacancies in small enterprises was estimated for France and Italy. Malta was excluded from the analysis, since estimates cannot reasonably reflect developments in this small country. For France and Italy, the stocks of vacancies are estimated separately for large and small enterprises and then added up. For large enterprises the job vacancy rates published by Eurostat is multiplied with the employment in large enterprises according to the INSEE and Istat websites. For the stock of vacancies in enterprises with less than 10 employees, we

additionally assumed that the vacancy rate is the average of the vacancy rate of small enterprises in Spain, Portugal and Sweden. Thus, the estimated stock of vacancies partly reflects a sound estimate for large enterprises and partly an expert approximation for small enterprises. But more importantly, it must not be ruled out that differences with for example Germany originate from different sampling units (corporate versus local) or different sources (administrative versus survey).

For Austria and Poland, the job vacancy rate and the number of employees are published separately by Eurostat, and the stock of vacancies is calculated by multiplying the two.

Finally, data in small sectors are sometimes not published in certain quarters, most notably mining, water and electricity in Germany, real estate in Estonia and real estate and the finance sector in Portugal. We partly derived these values from the other sector totals and partly by interpolating between values of the preceding and subsequent quarter.