



European Network of Public Employment Services

PES support to recovery

Thematic paper

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INTRODUCTION

This paper will provide an overview of the key questions and issues for Public Employment Services (PES) in determining how best to assist labour market recovery from the COVID-19 pandemic. It will draw upon existing promising practices and academic research, as well as the discussions held in the Thematic Review Workshop (TRW) 'PES Support to recovery' held on 9-10 November 2021.

The study draws on the responses of Public Employment Services to the COVID-19 pandemic, during the various phases of the crisis and the period of economic recovery from the crisis, up to November 2021. It seeks to explore what was put in place to tackle the immediate effects of the pandemic and to prepare for a post-COVID-19 labour market.

The TRW built upon several previous activities to consider the impact of the pandemic which were included in the PES Network 2021 Work Programme¹. Adaptation to and recovery from the crisis was one of the guiding topics of PES Network activities. Consequently, a number of working groups, studies, webinars, surveys, and review workshops were organised around two thematic pillars considering recovery: in the context of the future of work, and its implications for PES service delivery.

The COVID-19 crisis had a very significant impact upon the economy and labour market. Large numbers of workers were directly affected by lockdowns, some continue to work remotely including through teleworking, and unfortunately many have lost their jobs. Certain people employed in essential services have experienced greatly increased workloads in response to the crisis whilst many employers face continuing problems recruiting staff.

Many sectors will experience permanent changes in working practices, and in some demand will reduce. There will also be skill shortages as new trends emerge. There has been a considerable increase in non-standard work² leading to deeper divisions in EU labour markets between well protected workers and those with limited access to social protection and employment rights. PES are consequently having to deal with increasing labour market segmentation. There are pressures from imbalances, with recruitment difficulties in bottleneck occupations and vulnerable clients struggling to find work. This has been particularly significant for growing numbers of workers in 'compound non-standard' employment (having a mix of work status, i.e., temporary, self-employed, and part-time).

Policy measures to increase employment through the growth of quality jobs are essential whilst Europe moves into recovery from COVID. PES are key actors in assisting efforts to both, support transitions into growing sectors, especially in digital, green, and health sectors, and participating in programmes facilitating restructuring in sectors particularly affected because of disruption caused by the pandemic.

A range of practices presented at the TRW event confirmed that PES strategies and priorities are consistent with those of the EU and seek to address recovery challenges. These particularly require the building of capacity to support upskilling in a very dynamic labour market where many adults have low levels of educational attainment and low digital, or obsolete skills.

As identified during the TRW, PES are developing online practices which they have introduced to analyse labour market needs and skills requirements. These have enabled them to assist jobseekers in dealing with the challenges of increased unemployment and the risks from long term inactivity due to COVID.

¹ PES Network Work Programme 2021, European Commission Directorate General for Employment Social Affairs and Inclusion January 2021.

² See [OECD Policy Responses to Coronavirus](#). Distributional risks associated with non-standard work: Stylised facts and policy considerations, 12 June 2020.

The immediate impact of COVID on health, employment and incomes influenced governments to introduce emergency measures and apply considerable innovation in their delivery of employment services including both ALMPs and social protection coverage. These developments have both reinforced existing programmes and stimulated new policies and practices. Effective partnership working has been a feature of many such initiatives which have prioritised support on the most affected sectors, displaced workers, and those most at risk of falling into long term unemployment and inactivity because of labour market disruption. As such, the key PES delivery priority in supporting the recovery from COVID has been to ensure a coordinated response in the provision of employment services. This has especially emphasised provision for disadvantaged and vulnerable jobseekers placed in the most precarious labour market situations because of the pandemic.

PES have had to confront the dual task of mobilising to cope with rapidly increasing unemployment and simultaneously assisting employers from sectors with increasing demand to recruit workers. There has been a significant increase in use of digital channels for service delivery and in partnerships to promote skills development. This enhanced PES role in improving digital inclusion exemplifies their crucial remit in addressing labour market disadvantage to promote both social and economic inclusion.

Developments in PES have mirrored wider labour market developments with the fast tracking of pre-existing trends towards automation and digitalisation during the pandemic. In this regard digital technologies have enhanced the effectiveness of PES including through improving their internal organisation and the management of relationships with other public and private providers in the expanding PES ecosystem.

The pandemic also saw a trend with an increase in the coverage and generosity of cash benefits and employment subsidies. This has reinforced the importance of activation and improving the co-ordination of PES and social protection programmes.

1. THE CONSEQUENCES OF COVID-19 AND EMERGING LABOUR MARKET TRENDS

At the time of writing, the European economy is expanding robustly, with a generally positive outlook. However, all countries, and especially those with macro-imbalances, remain vulnerable to future shocks. However, it is crucial to note that the situation remains volatile and subject to rapid change.

The COVID-19 pandemic has resulted in a major labour market crisis. The OECD³ has highlighted the vital role of European funding in facilitating recovery identifying the efficient use of Next Generation EU funds as a top immediate policy priority. There are clear possibilities for PES to shape policy interventions to influence an inclusive recovery utilising social capital and labour force potential. Laurence Boone, G20 Finance Deputy, has commented that the recovery from COVID presents 'a unique opportunity to shape a vibrant recovery.'⁴

CEDEFOP⁵ analysis predicts a net loss of almost 7 million jobs lost or not created by 2022 because of the pandemic. However, the sectoral impact is expected to be significantly variable. Sectors with certain characteristics will grow due to both the impact of the crisis and long-term trends including increased digitalisation. Reduced recruitment during the pandemic may develop into permanent structural reductions because of post-COVID readjustment.

³ OECD tackling coronavirus contributing to a global effort. PES in the frontline for jobseekers, workers, and employers, 28th April 2020.

⁴ Ecoscope – an economic lens on policies for growth and well-being, April 14th, 2021.

⁵ Coronavirus impact on jobs in EU sectors and occupations: skills forecast analysis CEDEFOP, 10th March 2021.

Livanos (2021) has explained that jobs in sectors and occupations flexible enough to adapt to the new norms of social distancing and telework are likely to persist even after the pandemic, altering the nature of work which traditionally called for physical space.

There is uncertainty concerning the future employment levels in some sectors, e.g., manufacturing, accommodation and food which were most affected by COVID.

Employment in non-marketed essential service sectors, (e.g., health), and where workers have elevated levels of protection (e.g., public administration), are expected to be least affected. Employment in sectors (e.g., mining) where social distancing is comparatively easier, and outputs are less reliant on consumer expenditure are expected to experience only a limited reduction in employment.

Workers in sectors where there is little scope for home working (e.g., machine operators), or continuing reductions in consumer demand (e.g., engineering professionals), are expected to experience declines in recruitment levels over the next two years.

PES is therefore most likely to be supporting the recovery amid increasing occupational polarisation with a particularly adverse impact upon occupations requiring medium level qualifications, (e.g., assemblers). Health related occupations, which are essential to counter the pandemic, and teaching and IT professionals, where it is easy to telework, are amongst the least affected groups.

The OECD (2020) has described effective employer engagement as critical for PES to ensure job placements and support job quality. The core PES requirement is effective matching. However, PES interventions cover the full range of services for employers including attracting and registering vacancies, advising employers about available ALMPs to support recruitment, assistance for recruitment exercises, including sifting to pre-select candidates for interview, and advice on HR and legal issues.

The need to increase employer confidence in PES was identified by several pre-COVID studies. Oberholzer (2018) reported a reluctance by employers, especially in certain sectors, to use PES. The perception from some employers that PES was not necessary for recruitment programmes, or scepticism concerning the quality of candidates and level of service has been reflected in various studies (see OECD 2015, van Berkel 2020).

To ensure that PES can influence a labour market recovery that does not exclude more vulnerable people, they must identify areas of mutual interest with employers and promote these with and to them. The focus of these approaches should be increased dialogue with employers to identify their needs and how PES can support these. Investment in career guidance and skills matching can assist in managing the more frequent transitions which are likely to be a significant feature of the post-COVID labour market.

PES are key actors in providing services to ensure that government policy responses are effective, enabling support to be targeted to deliver actions to meet labour market priorities. European PES must therefore ensure that programmes and policies can build resilience and sustainability, boost productivity and facilitate reallocation of labour where necessary. This will be needed to help people to adapt to change including through interventions to promote as smooth as possible transitions for individuals. Achieving this will require PES to improve their analysis and responses to skill shortages, ensuring that counsellors have up to date information to steer clients towards growth sectors and avoid mismatches. Further consideration will also need to be given to the design of social safety nets.

The [European Pillar of Social Rights](#)⁶ sets out 20 key principles and rights essential for fair and well-functioning labour markets and social protection systems. It therefore provides

⁶ European Pillar of Social Rights proclamation of the European Parliament, Council, and Commission, approved by European Parliament, Council, and Commission, November 2017.

an important policy framework within which PES can introduce innovative approaches. The Social Pillar Action Plan⁷ which turns these principles into concrete actions, proposing headline targets for the EU to reach by 2030, can assist PES in mainstreaming Social Pillar priorities. This can provide PES with a mechanism for addressing challenges faced by citizens in adjusting to the new labour market situation post-COVID. As inequality, long term unemployment (LTU) and job insecurity have a disproportionate impact upon the most vulnerable citizens it is essential that PES to deliver their mandate as described in the PES Network Decision⁸. The legal mandate for the Network encourages PES 'to promote the employment of all vulnerable social groups with high unemployment rates, especially older workers and young person's not in employment, education, or training as well as people with disabilities and people facing discrimination on multiple grounds.' Together with the PES Network Strategy⁹ the legal text provides a forward looking and flexible framework to assist PES in meeting future challenges.

2. EU POLICY CONTEXT AND RECOVERY PRIORITIES

The European Commission Recommendation on Effective Support to Employment (EASE)¹⁰ adopted on 4 March 2021 outlines an approach to transition between emergency measures taken to preserve jobs during the COVID pandemic and new measures required during the subsequent recovery phase. It forms the employment component of the 750-billion-euro Next Generation EU Programme¹¹ for the recovery and greening of Europe.

EASE comprises guidance to Member States on ALMPs and indicates how they can use EU funds to support EASE policies. They are invited to develop coherent policy packages of ALMPs, combining temporary and permanent measures to address the labour market challenges driven by the pandemic. It advocates approaches to bridge and mitigate skill shortages to foster economic growth and promote post-pandemic recovery particularly assisting people in successfully managing transitions to the green and digital economies.

The Recommendation describes required policy packages as consisting of three components:

- hiring incentives and entrepreneurial support;
- upskilling and reskilling opportunities;
- enhanced support by employment services.

Research¹² has identified PES delivering recovery and transition measures focussing on four priority areas of activity which can be supported through EU funding:

- promotion of hiring and support for business creation and entrepreneurship;
- upskilling and reskilling to support employability;
- promotion and support for transitions across sectors and occupations;
- support for sectors and workers still severely impacted by the crisis or needing to adapt to new post -crisis labour market situations.

⁷ European Pillar of Social Rights Action Plan Luxembourg Publications Office of EU, 2021.

⁸ Decision (EU) 2020/1782 of the European Parliament and of the Council of 25 November 2020 amending Decision No 573/2014/EU on enhanced co-operation between Public Employment Services.

⁹ Approved at [PES Network Board Meeting 25th June 2021](#).

¹⁰ Commission Recommendation on an effective active support to employment following the COVID-19 crisis (EASE) Brussels 4.3.2021 C (2021) 1372 final.

¹¹ Two *ibid*.

¹² Examples obtained from analysis of monthly PES updates on COVID-19 related responses and measures.

Policy initiatives under the European Pillar of Social Rights relate to several activities linked to: the European Gender Equality Strategy 2020-2025, the reinforced Youth Guarantee, the Youth Employment Support package, the Skills Agenda, and innovation and job creation and the European Commission's proposal for adequate minimum wages in the EU. In assisting the recovery from COVID, PES must review their strategies in the context of the prevailing conditions during the post-pandemic period.

The social market economy is intended to allow economies to grow and reduce poverty and inequality providing stability so that the economy can respond to EU citizens' needs. PES need to particularly support SMEs given their significant source of employment across Europe to boost jobs and help Europe's businesses and consumers move towards the more sustainable use of resources.

Youth employment support is essential to enable young people to develop their full potential and to play a full role in green and digital transitions. In addition to further developing participation in the reinforced youth guarantee, PES will need to future-proof their input to VET policy including a further impetus to promote and strengthen apprenticeships. In advance of the European Year of Youth 2022 a report from the PES Network¹³ focusses on the latest updates in PES administrative capacity to implement the reinforced Youth Guarantee¹⁴ adopted in October 2020.

The report finds that a partnership-based approach is now applied by all PES in working with young people not in employment, education, or training (NEETs) and most have relevant targets in place. It also highlights that despite COVID, important progress has been made by PES in staff allocation and training: profiling or screening tools: and the provision of services to overcome barriers to employment or education.

PES can develop their digital strategies within the context of the European 2019-2024 priorities for a Europe fit for the digital age. This aims to ensure that digital transformations can work for both people and businesses whilst helping to achieve the target of a climate-neutral Europe by 2050.

The European Green Deal is intended to overcome climate change and environmental degradation supporting a transformation into a modern resource-efficient and competitive economy. Member States can exploit synergies through full inclusion of PES in initiatives to support measures to stimulate employment growth as part of the Next Generation EU Recovery Plan, and the budget to finance the Green Deal.

These pan-European initiatives to deliver on priorities agreed by Member States need to be reflected in the strategies and operational delivery programmes of individual PES to optimise their contribution to support for the recovery.

3. PES INPUT TO DEVELOPMENT OF SKILLS POLICY

The latest version of the [European Skills Agenda](#) (2020)¹⁵ emphasises the urgency which COVID has added to skills development in Europe. The agenda now includes quantitative targets to increase the participation of adults in education and training to be achieved over the next five years. Of especial relevance the Social Pillar Action Plan¹⁶ includes targets for at least 78% of the population aged 20 to 64 years to be in employment by 2030 and at least 60% of all adults to be participating in training. PES must work in concert with

¹³ 2021 PES Capacity Questionnaire Part II Monitoring of PES support of the reinforced Youth Guarantee Survey – based report, Icon Institute.

¹⁴ Council Recommendation of 30 October 2020 on A Bridge to Jobs – Reenforcing the Youth Guarantee and replacing the Council Recommendation of 22 April 2013 on establishing a Youth Guarantee 2020/C 372/01.

¹⁵ 5-year plan to help individuals and business to develop more and better skills by strengthening competitiveness, ensuring social fairness and building resilience to react to crisis, setting objectives to be achieved by 2025.

¹⁶ European Pillar of Social Rights Action Plan Luxembourg Publications Office of the European Union 2021.

skills providers to develop plans for the achievement of these targets, this can incentivise organisational responses to meet the challenge of delivering skills needed for labour market recovery. This is especially relevant to increasing the participation of low qualified adults in education and training, reducing the risk of low qualified young people having a higher risk of unemployment and inactivity, addressing skills mismatches, and tackling labour shortages. A number of specific PES responses are therefore necessary in response to these challenges.

The Belgium (Flanders) PES is piloting a scheme for avoiding job immobility by pro-active work to work transitions. It stems from a need to address both pandemic and structural labour market trends. The programme encompasses a more pro-active approach towards employers, both SMEs and larger companies. A system of secondary prevention is applied to assist career flow, when dismissals seem imminent, and doorstarts where collective dismissals have started. Workers are helped secure new jobs or retraining.

Low skilled workers were at the greatest risk of unemployment and in-work poverty before the pandemic, disruption due to COVID has placed this group in an even more precarious situation. Despite the obvious risks for people in this group most vulnerable to displacement from labour market restructuring only 4% of low skilled workers were benefiting from lifelong learning in 2018¹⁷ with lowest levels of participation identified amongst the youngest cohort. To redress this situation and mitigate the risks of increased LTU and inactivity PES have been increasingly orientating their collaborations with employers and training providers to promote upskilling as part of structured occupational transition programmes.

NEET rates have increased during the pandemic¹⁸, to reverse this trend and contribute to a return to pre-COVID levels during the recovery PES should enhance their involvement in programmes to support efficient school to work (STW) transitions. In collaboration with partners including from educational institutions, employer groups, and the VET sector, PES can assist in guiding young people towards training programmes and employment opportunities in growing sectors. The EU Aim, Learn, Master, Achieve (ALMA)¹⁹ programme, providing a supervised stay abroad for a period of 2 to 6 months in another EU Member State and a comprehensive project cycle implying coaching and counselling at every step, is an example of an initiative which can support this objective.

A CEDEFOP survey²⁰ reported a quarter of tertiary graduates in the European Union were overqualified for their job. PES can provide data driven insights drawn from their matching activities to VET providers in support of efforts to improve the quality and attractiveness of training programmes. This improved provision of information can assist youth in making better career choices and reduce over-qualification.

Perhaps the most significant contribution PES can make is in addressing labour shortages which are likely to be a continuing feature of the post-COVID recovery frequently coinciding with high levels of unemployment for certain groups. Skill shortages which have persisted during the pandemic are expected to increase. The extent of shortage occupations spanning qualification levels and skills profiles, including truck drivers, skilled trades, and IT professionals presents an opportunity for PES to establish and reaffirm its role as a central agent supporting improved labour market balance. Through enhanced utilisation of labour market information (LMI) and client data PES can continue to upgrade their matching services to develop improved responses for dealing with both labour and skill shortages thus furthering their essential contribution to labour market recovery. This can

¹⁷ See Konle-Seidl R, European Parliament briefing The Future of Work – Implications for Public Employment Services in EU, November 2020.

¹⁸ 15 *ibid*.

¹⁹ See EU President von der Leyen 2021 State of the Union Address.

²⁰ CEDEFOP [Skills Intelligence, Over-qualification rate of tertiary graduates](#). 2011-2019 released 2021.

re-emphasis the core PES mandate supplying workers to meet employer demand in an increasingly challenging environment. This is especially important with the demographic pressures which are expected to increase with an ageing workforce across Europe.

4. PES STRATEGY TO SUPPORT RECOVERY PRIORITIES

All countries are experiencing skill shortages, and experienced increased unemployment as a consequence of the pandemic. The European policy frame (especially the Social Pillar, Green Deal, and Digital Strategy) provides a sound foundation for PES to develop measures to support the recovery in their countries.

The labour market crisis generated by COVID has had a different impact from earlier crises resulting in both bottlenecks and shortages with growth in some occupations whilst others are likely to encounter a faster decline due to the pandemic.

The key aims of PES interventions are to support workers and employers to deal with the changes driven by COVID. The primary challenge for PES in delivering assistance is in resolving the imbalance between shortages of workers in certain occupations and the risk of more people in vulnerable groups becoming long term unemployed or falling into inactivity. Structural changes evident pre-COVID, especially digitalisation and automation, and an ageing population, have been reinforced by restrictions on migration reducing the labour supply from third countries.

The PES is one of the major governments' agencies for provision of responses to national, regional, and local economic and natural crises, through implementing active labour market policies (ALMPs) often linked to passive labour market policies (PLMPs) through the administration of social protection schemes.

To fulfil their role PES depend upon reliable up-to-date information so that they can plan services which meet customers' needs in a rapidly changing environment. Restrictions introduced to combat the virus have limited the scope for face-to-face contact in many countries, this has presented huge challenges in the collection of data through tools such as labour force surveys which have often relied upon traditional interviews to collect information. Many PES have responded with improvements in their systems for collecting and analysing labour market information (LMI). This has been facilitated through increased use of digital tools enabling more timely and frequent data collection. COVID driven changes in labour market operation have also required PES to review questions used in surveys to gather LMI, in some cases these have had to be reformulated or in others removed due to there no longer being relevant.

Effective employer engagement is essential for successful PES interventions. PES must therefore be agile, responsive, and mindful of tensions between balancing jobseeker aspirations and labour market needs, these can be particularly apparent in balancing support for employers in growth industries and those in decline. As an example, PES can work with employers and other stakeholders to support labour market transitions whilst also co-operating in initiatives to upskill workers and improve productivity in sectors such as hospitality which are characterised by precarious conditions and low wages, but which still maintain significant labour demand. This approach can potentially deliver a 'win/win' with opportunities for some people to move to more secure/better paid occupations, whilst creating job openings for others in sectors where conditions and prospects are improving. This can prevent PES compromising relationships with employers and exacerbating shortages.

It is important to systematically learn from the crisis to enable the best possible contingency plans to be developed for use in future periods of labour market disruption. PES need to review their employer engagement strategies and increase their capacity for employer engagement. PES can enhance their employer support services to include training employers (especially SMEs) in more effective transition management.

The role of PES needs to evolve to incorporate career management to enable clients to manage more frequent transitions. Establishing employer engagement criteria can be complex. There are as yet no clear definitions of green jobs, and the digital economy can involve non-sustainable inputs and outputs. The potential for sectors to provide longer term employment for priority clients could be the most appropriate employer engagement criteria. PES can deliver a vital role as convenors of groups of actors who need to collaborate to support more effective transitions.

PES must consider a broad range of socio-economic factors when considering which directions to follow to best support recovery. PES must work within political decisions and follow policy drivers when determining responses.

Establishing formal co-operation structures can enable PES and other providers of support services to jointly help. In this way gaps and duplication from organisational mandates and legal settings/institutional structures can be identified and addressed. This can enable joined up services to be provided for jobseekers. Such co-operation can also provide evidence for governments to support policy and administrative changes.

Skills needs analysis systems are an essential tool enabling PES to design support services for the recovery. These can assist the identification of transferable transversal skills²¹ to support jobseeker transitions and facilitate matching to balance jobseeker preferences with opportunities in growing sectors. Information from skills needs analysis systems can be applied to support decisions concerning which VET courses should be funded based upon future employment prospects in particular sectors.

PES have an important role in the evaluation of support measures, including subsidies. During the recovery period measures need to be periodically and systematically reviewed to ensure that they are still effective. The 'great resignation' is altering the balance of the relationship between employers and job seekers which should be considered in future PES service planning. Therefore, PES need to co-operate with a range of actors to optimise efforts to combat disruption from COVID, these include employers' organisations, VET providers, specialist support NGOs and social security agencies.

The Thematic Review Workshop investigating PES support for the recovery concluded that the full range of policy measures described in this section need to be considered and be underpinned by an especial focus on supporting sectoral and occupational transitions.

5. SUPPORTING SECTORAL AND OCCUPATIONAL TRANSITIONS

5.1 PES short term strategic considerations

The OECD (2021) has stressed the importance of ALMPs that connect people to jobs in helping to ensure an equitable and sustained recovery from the COVID crisis. As evidenced by a PES Network survey²², Member States reacted quickly to the crisis through increasing support for PES. This has involved service enhancement, upscaled training programmes and measures to stimulate labour demand. Additional PES staffing and resource to expand digital capacity are an essential necessary response which emphasises the need for further resources in the forthcoming years. In this way, high quality employment services and programmes can be effective in fostering the quick reintegration of jobseekers.

The 2021 PES Network Capacity Report²³ noted that the pandemic more often led to the initiation or acceleration of strategies and reforms (mentioned by 22 of 24 PES) than delaying or postponing these to a later date (10 and 14 PES respectively). Reforms in

²¹ Characterised as soft skills that can be applied across various industries and roles.

²² Reported in PES Network Thematic Review Workshop on PES support to recovery Discussion paper October 2021.

²³ European PES Network, Assessment Report on PES Capacity 2021.

ALMPs and client services were moved forward to respond to new needs arising from the pandemic though some envisaged and in some cases very ambitious reforms were postponed or delayed.

People in vulnerable groups are especially at risk of longer-term scarring effects if they are not provided with targeted support for labour market re-integration during the economic recovery. Many PES already had well established digital services in place at the start of the crisis. Evidence of operational delivery during COVID suggests that increasing investment in digital services can be of benefit for all PES. Specifically, this can offer flexible efficient services for the increasing number of PES customers able and with a preference to use e channels to conduct their business with PES, whilst creating extra capacity for face-to-face engagement with those jobseekers most at risk of longer-term exclusion.

PES must invest in ALMPs to facilitate effective labour re-allocation. This requires two dimensions to be balanced, support for transitions from declining to growing occupational sectors, and ensuring that these particularly focus upon the re-integration needs of PES clients likely to be most impacted by labour market restructuring. The latter are disproportionately drawn from disadvantaged groups: women, young people, the low skilled, and especially older people tend to be employed in declining sectors²⁴.

Despite the increasingly dynamic nature of the labour market, in the context of rapid technology driven change, few countries have developed automatic adjustment mechanisms to match ALMP resource with fluctuating economic conditions. Introducing such systems can support PES in delivering more effective integration assistance going forward, contribute to improved prospects for, especially vulnerable, job seekers in the aftermath of COVID, and future proof PES services against the risk of future labour market disruption.

Increased input of resource into PES will not, however, translate into improved higher quality outputs unless in the longer-term structural capacity constraints can be remedied. This can involve review and amendment of the legal bases regulating PES delivery of ALMPs and reforming the organisational structure of PES where necessary to reflect evolving occupational structures, changing job design, and new employment patterns. Meeting these requirements will depend upon an increasing emphasis on developing partnerships with stakeholders.

PES must increasingly operate as part of a broad employment service delivery ecosystem; this will include the utilisation of open system architecture offering customers access to a range of services supplied by PES and other providers through shared platforms. The increased flexibility afforded by better coordinated service delivery from combinations of support actors can facilitate the more agile responses needed to support recovery from the crisis and ensure PES can respond to future changes in an increasingly volatile and unpredictable macro-economic climate.

To make the fullest possible contribution to the post-COVID recovery, PES must carefully review their links with other labour market actors and support organisations. They will need to analyse institutional settings so that liaison arrangements can be improved where necessary to ensure that they are consistent with meeting labour market needs.

The inception of more integrated support services in the Netherlands is an example of enhanced links with stakeholders being achieved through the evolution of the PES delivery ecosystem. The establishment of Regional Transition Teams provides a good example of a system to foster cooperation between PES and regional actors to deploy the budgets of individual stakeholders to facilitate labour market transitions.

²⁴ See Walwei U, and Deller J, Labour Market Participation of Older Workers Drivers and Obstacles Intereconomics Review of European Economic Policy Number 6 Volume 56 2021.

Provision of labour market services in the Netherlands has traditionally been split between municipalities having responsibility for supporting the long term unemployed and the PES supporting persons receiving unemployment and disability benefits. The Regional Transition Teams have brought stakeholders together combining inputs from PES and municipalities who work with trades unions, employer associations, and educational institutes to provide a joined-up response to support the unemployed. Following a joint triage and common intake phase clients are offered bespoke integration packages comprising elements of support from stakeholders as required to meet their individual needs. Unemployment prevention and addressing skill shortages are among the services provided by participating organisations with an extra resource available from a deallocated budget to supplement individual agency contributions.

Whilst short term responses have proven to be effective in dealing with immediate labour market contingencies generated by the pandemic to effectively support the recovery, PES must re-review their longer-term strategies aligning service design and targeting with modernised delivery systems.

5.2 PES Medium/longer term strategic implications

Lund et al. (2021) in a study investigating the impact of COVID on eight economies found that the physical dimension of work is a new factor shaping future employment patterns, brought to the fore by health and safety considerations. Their research identified what are becoming broadly accepted as three likely long-term trends which can have especially significant implications. Firstly, 20%-25% of workers in advanced economies remaining in hybrid/remote work, secondly considerable growth in e-commerce hastening the decline of employment in travel, leisure and physical stores while increasing jobs in distribution centres and last mile delivery, finally accelerated adoption of the automation and artificial intelligence (AI) introduced to deal with the pandemic introducing more robots into manufacturing and warehousing with increasing use of self service in customer interaction. Remote working may further reduce the demand for transportation, retail, and food services.

The research (Lund et al. 2021) suggested that 25% of workers in advanced economies may need to switch occupations by 2030 with women, the less educated, and youth being most affected. Even though employment in high wage occupations e.g., in healthcare and STEM (Science, Technology, Engineering and Mathematics) professions is expected to continue expanding, advanced economies may experience the first ever decline in overall employment in low wage occupations.

Likely developments over the next decade clearly require an accelerated focus on the PES policy responses to the future of work which were being considered in longer term scenario planning pre-COVID. The need for employers to reformulate their approaches to recruitment and retraining and embark upon large scale redeployment programmes presents opportunities for PES to raise their profile and increase their employer engagement as active partners in the management of sectoral and occupational transitions.

PES can make significant contributions to supporting the recovery from COVID through facilitating rapid and efficient labour market transitions. To achieve this, they must analyse labour market trends and use insights gained in planning reform of their delivery systems to meet the challenges of post pandemic labour market. This should include investment in PES e-services for jobseeker and employer customers. To enable occupational mobility, PES must prioritise digital inclusion including through partnerships with skills providers to ensure that training programmes equip people to take advantage of increasing employment opportunities in the knowledge economy. In many countries the context for skills policy post-COVID will be an increasing emphasis upon soft skills and experience rather than certification. PES may consider reflecting this in their own internal HR policies and recruitment practices.

6. PES SUPPORT FOR SKILLS DEVELOPMENT TO ASSIST LABOUR MARKET RECOVERY

One of the most pressing skills related labour market challenges which a more common Network approach could address is the frequently low participation of (low-qualified) adults in education and training (11.1% in 2018)²⁵. Of particular concern in the context of potential labour shortages in certain sectors and Europe's ageing population is that participation in training and other skills development activities declines with age. Low skilled workers are disproportionately likely to be unemployed, suffering in-work poverty, and at risk of LTU and inactivity due to labour market disruption and structural change. In this regard there are compelling arguments for PES to promote and actively participate in partnerships with employers and VET providers to prioritise interventions to promote skills interventions with at risk target groups.

PES use of upgraded labour market information systems is particularly important as a tool to inform the development of PES strategies and provide the best possible guidance to clients so that they can make the most informed decisions on future employment and career options.

The Estonian skills and labour forecasting system OSKA combines secondary data to develop skills predictions for a 5–10-year period and cross references this with primary data drawn from interviews with expert labour market analysts. Forecasting outputs for all sectors are used to create appropriate training and education programmes to meet future labour market needs. A main customer of the system is the PES²⁶ utilising data to improve the quality of LMI which counsellors can share with clients through outputs from this system being provided for front line counsellors. Counsellors' guidance for jobseekers is therefore informed by the most up to date intelligence on labour market trends. The system also enhances the strategic development of employer engagement activity. Employer representatives on the PES board are similarly able to use data to underpin their promotion of employability in the design and delivery of PES support systems and ALMPs.

The PES in Spain²⁷ has implemented a labour market observatory in partnership with a network of provincial offices. They can apply analysis of labour market trends to conduct diagnostic analyses of workers training needs and the vocational requirements demanded by employers. This means that jobseekers can obtain up to date information on skills needed for specific jobs.

Other programmes seek to support and incentivise employers to invest in training. Schemes introduced in Germany²⁸ and Ireland²⁹ are supporting the recovery through schemes encouraging apprenticeships through subsidies and derisking these for employers paying particular attention to the needs of SMEs. The German programme incentivises year on year increases in apprenticeship numbers, and the re-employment of apprentice displaced when enterprises cease trading.

In Italy, the New Skills Fund has been established to compensate companies for costs incurred in implementing STW schemes for training, re-skilling, and upskilling employees during the COVID recovery phase following agreements on working time regulations with Unions.

The rules of the Danish Job Rotation scheme (jobrotationsordningen) have been relaxed in response to the pandemic. The scheme aims to address two main problems, the unemployment rate, and the need to upgrade the skills of employed people. An employer

²⁵ 15 *ibid.*

²⁶ 10 *ibid.*

²⁷ 10 *ibid.*

²⁸ 11 *ibid.*

²⁹ 11 *ibid.*

can hire unemployed people as temporary workers while permanent staff receive further education and training. A precondition is that there is an 'hour-to-hour' relationship between the employees attending education or training and the temporarily recruited workers. The scheme enables an unemployed person to temporarily replace an employee at an enterprise to obtain work-experience, while the current employee takes part in further education. In a revision of qualifying rules more unskilled workers can now take advantage of the professional training opportunities. Short VET courses have been simplified, and programmes unified to better meet the needs of the unemployed in adapting to new roles, with content and design strengthened. Similarly, the access rules for entering adult apprenticeships (voksenlaerlingeordningen) have been relaxed.

For many PES closer engagement with the life-long guidance system would represent a significant change in their delivery mandate. However, given the current low level of participation in these activities across the EU (only 4% of low-skilled workers currently benefit from lifelong learning³⁰) such a change can present a sound investment for PES. Supporting people to better manage their more frequent transitions can help ease future capacity pressures through reducing the volume of people becoming unemployed. The latter point is particularly relevant as some PES may have trouble in identifying and allocating resource to meet the needs of large numbers of lower skilled displaced workers who may become unemployed and need support through difficult transitions.

Whelan, Murphy and Mc Gann (2021) describe the need for employment services guidance to shift from a work-first to a life-long guidance typology. Sultana and Watts (2006) commented on the then small number of PES across Europe which had 'taken the challenge' of comprehensively addressing lifelong guidance needs. Borbely-Pecze and Watts (2011) developed a series of case studies noting the availability of lifelong guidance from PES including Belgium (Flanders), Germany, and Ireland. This support was typically available from PES, as in the case of Flanders and Ireland, where the organisation always had responsibility for provision of training as well as employment placement services. The German PES has responsibility for providing guidance services in schools.

The Spanish PES (SEPE) was given responsibility for vocational training in 2015. Since 2019 SEPE has had an objective to ensure that the actions of all stakeholders converge within a coherent methodology for detecting training needs and converting them into training specialities. This has identified synergies and driven all stakeholders engaged in the observation and forecasting of the labour market and vocational training for employment to cooperate. This includes provision of data to a labour market observatory operated by SEPE and sharing information to assist employment counsellors and VET providers in applying analysis on longer term labour market trends into their activities.

The labour market prospects of young people can be particularly affected during periods of economic downturn. In addition to finding it especially difficult to secure new jobs on being made redundant, they can also be at risk of long-term inactivity through inadequate support during school to work transitions (STWs). PES can support youth in the recovery from the COVID crisis through increasing dialogue with VET providers to ensure that training provision is both relevant and attractive to clients. The labour market knowledge and insight which PES hold can be a vital input to dialogue and discussion concerning the design of curricula to ensure that these can meet changing labour market needs.

Effective support through outreach can be essential, particularly for groups such as young migrants who may encounter multiple barriers to labour market entry. Consequently PES face challenges in supporting young people who have been placed at particular risk of long-term unemployment and inactivity because of COVID which can also increase the numbers of young graduates employed in jobs for which they are overqualified. Before the pandemic PES efforts with other partners were proving successful in reducing numbers of early school

³⁰ 15 *ibid.*

leavers and NEETs. The EU youth unemployment rate dropped from 24.4% to 15.4% between 2013 and 2020 whilst the pre-COVID EU NEET rate (10.9%)³¹ had returned to the level pre the financial crisis, however this has subsequently increased³².

The France Relance plan incorporates several measures to assist youth employment. These have included financial support for young graduates under thirty seeking employment, aid for hiring young people, and exceptional aid for apprenticeships.

7. INCREASING PES OPERATIONAL CAPACITY TO SUPPORT THE RECOVERY

Fast changing labour markets require employees and jobseekers to constantly adjust their skills. Research by Cedefop (2016) highlighted the scale of the upskilling challenge across the EU: 46% of adults had a low level of education, low digital and cognitive skills, or obsolete skills; 54% of the working population were predicted to need to adapt their qualifications in an environment characterised by increasingly frequent transitions and where the content of work was already changing dramatically. This situation will be even more pronounced following COVID.

PES, in concert with stakeholder partners as appropriate, must deliver new measures to meet the needs of citizens who have not traditionally been PES clients, especially people in work and at risk of unemployment. They must engage in re- and up-skilling programmes to help maintain employment including through seamless transitions, this activity has not typically been part of the PES delivery mandate.

The role of PES counsellors will need to evolve to incorporate information on skills anticipation. Few PES in Europe have been direct providers of careers services, employment and careers advice have traditionally operated as separate professional disciplines, and links between the majority of PES (which do not deliver in-house career advice services) and agencies offering lifelong guidance are often weak. A comprehensive lifelong guidance system is a prerequisite for providing sufficient support for both the short-term recovery period and longer-term labour market restructuring. PES must necessarily be significant partners in such arrangements which will need advice and counselling to be 'future-proofed' to adapt training programmes over time. Ensuring that PES support for young people is sufficient to meet these challenges will be especially important. As such ensuring that young people can develop the skills required by both current and future labour markets will be a particular priority, particularly ensuring increased digital skills and more general soft skills.

The (revised 2021) PES Network Strategy³³ provides a sound framework within which PES can review and reorientate their strategies to focus on the needs of jobseekers and employers during the recovery. The 2021 PES Network Capacity Report³⁴ describes the positive response of PES in planning for the post-pandemic period. Strategic objectives to enhance support for vulnerable people and LTU (BE-VDAB, CY, ES, IE, LU, NO and SK) and links with employers (BE-VDAB, CY, EL, ES and LU) are recurring themes. Several PES (BE-Actiris, BE-VDAB, EL, ES, NO and SK) report strengthening partnerships with other actors such as social partners and social services to enhance implementation of recovery measures.

Skills has been a continuing feature of discussion and debate amongst PES since the inception of the Network through various working groups and seminars, though a specific overall EU PES position in relation to this issue has not previously been developed. Konle-Seidl (2020), considering why a comprehensive Network Strategy for addressing skills

³¹ Eurostat data.

³² 22 *ibid.*

³³ 8 *ibid.*

³⁴ 14 *ibid.*

needs in the labour market had not been produced so far, noted the various conditions which must be fulfilled when prioritising preventative activity, and intervening to support upskilling. This had differing implications for various customer groups. Possibly the most significant condition which would need to be fulfilled to enable a common PES Network approach would be a consensus amongst Member States for a particular level of employer and employee engagement with PES. This would potentially require legislation in some countries to facilitate the necessary degree of institutional dialogue and cohesion.

8. DIGITAL TRANSFORMATION OF PES SERVICES TO SUPPORT THE RECOVERY

Several recent PES innovations make particularly good use of enhanced digital capability to offer higher levels of support to clients in the post-pandemic recovery period.

The pandemic has been a catalyst for further development of digital and remote PES services. The onset of the pandemic understandably focussed PES on short-term urgent adjustments to deal with massive economic disruption and significant shocks to employment patterns. These included increased and accelerated use of digital services. Accelerated digitalisation of services was a common theme identified by PES reporting³⁵ on adjustments made in response to COVID. Identifying advantages from more accessible and efficient customer contact channels a number of PES have decided to prioritise digitalisation as part of their delivery strategies. BE-VDAB mentioned such acceleration of digital transformation as one of three main priorities for the coming period. Similarly, one of the six objectives of the Greek PES is a digital transformation programme to improve the quality and delivery of services to clients. Cyprus is pursuing digital transformation of almost all services currently provided to PES clients through face-to-face contact, as well as promoting a new culture to promote digital awareness amongst PES staff and clients. Both the German and the Lithuanian PES emphasise the use of different channels for communication and service delivery. The German PES plans to, amongst other targets, include video communication, call circles and online appointment scheduling. The Lithuanian strategy puts the focus on remote (blended) service delivery, digitalisation of PES services, and process optimisation and automatisisation to reduce administrative and bureaucratic burdens for both clients and PES staff.

An increasing investment in digital services is needed for PES to make an optimum contribution to the recovery. This can future proof PES operations to deal with an expected combination of structural and cyclical changes. Konle-Seidl (2021) has noted that in effect the speed of labour market adjustment means that for PES significant structural changes and strategic shifts have now often become urgent short-term priorities. In attending to such needs for immediate action PES must therefore engage with other labour market actors in ensuring a coordinated response.

The high priority afforded digital development across the PES Network in recent years provides a sound basis for collective input to optimise efforts to upgrade infrastructure across EU PES. This can build upon the rapid transition to virtual delivery of PES services during the crisis, which provided a spur to innovation, with the fast-tracking existing initiatives hastening the implementation of pre-planned improvements. Many of these developments will result in PES being better configured to deliver services more efficiently and constitute a positive contribution to supporting the recovery.

In several Member States enhanced delivery mechanisms have also enabled more rapid administration and delivery of benefits. More effective delivery of welfare support accompanied by provision of information on ALMPs and encouragement for recipients of passive income support transfers to become and remain active, can stimulate labour supply irrespective of the volume of vacancies.

³⁵ 14 *ibid.*

To support the labour market recovery, it is increasingly important that PES delivery systems keep pace with customer expectations and match the delivery standards of private sector enterprises. PES must therefore continue with the expansion of e-services including, online registration, automated job matching, guidance 'chats' and webinars.

Several countries were either trialling or considering 'digital-by-default' approaches through automated employment service models before the pandemic. An expectation that most jobseekers use a digital interface to contact PES can be appropriate with sufficient levels of user capacity and infrastructure. However, in all countries there will be a group, especially amongst hardest to place clients, best served through more traditional contact channels. Therefore, to prevent some of the most vulnerable jobseekers suffering ongoing labour market detachment because of digital exclusion PES must ensure that systems are in place to identify those in need of alternative contact channels for delivery of intensive specialist support.

The French PES has developed a deep learning-based recommender system helping jobseekers find relevant applications and tools based on their personal situation in the 'Employment App Store' (emploi-store.fr). The Netherlands PES has developed an application that detects potentially fraudulent behaviour by welfare recipients based on click data. The PES also uses fully digitalised profiling tools that make it possible to identify the online services that are the most suitable for every client. The Belgian-Flanders PES (VDAB) has developed a profiling tool (based on various machine learning models) to predict the time jobseekers are unemployed. VDAB has also developed a system of automated matching that minimises the need for caseworker intervention. Other VDAB online tools include online guidance services and advice for highly educated young people who are encountering difficulties with accessing the labour market.

The Swedish PES is engaging in the EU funded Democratic Digitalisation project. The project should ensure easy and quick navigation including a digital first approach enabling customers to self-serve whilst also incorporating into their channel strategy design elements to identify clients unable to access automated support systems. This ensures an inclusive approach ensuring equal and equivalent access to all services including those farthest from the labour market.

Luxembourg has developed an approach to maintain the activation of people during spells of unemployment through the Future skills training initiative. The programme focusses on the employment potential from growth in digital services the PES and national training centres offer 3 months intensive IT, soft skills and management skills training followed by a 6-month internship in the public sector.

9. CONCLUSIONS

As evidenced in this report and through inputs to the TRW, Member States have introduced a wide range of measures to mitigate the negative impact of COVID on employment. This has eased capacity pressures on PES in maintaining labour market attachment as Europe emerges from the crisis. Despite these initiatives the longer-term challenges from structural labour market changes remain. The pandemic has in many areas hastened pre-existing trends and placed even greater responsibility on PES to provide personalised support for the most vulnerable clients at the greatest risk of labour market disadvantage because of COVID.

The OECD (2020) has characterised recent changes in PES operating models as having the potential to enable the most efficient and effective ever delivery of PES services, placing PES in an advantageous position to provide support for employers and jobseekers to advance post-COVID labour market recovery. Evidence from the recent survey of PES

responses to COVID³⁶ illustrates significant action taken in many organisations to upgrade operational delivery to ensure service continuity. In this regard the pandemic has provided a boost to PES modernisation. To further build upon this sound foundation in the subsequent recovery phase and into the medium- and long-term PES must continue the momentum to further enhance digital transformation of employment and guidance services. This will require further investment in automated platforms and AI-enabled decision-making. PES strategies should therefore place such developments at the centre of future to continue meeting customer need in a frequently changing labour market.

Prior to the COVID pandemic, Europe having achieved a 73.1% employment rate in 2019, was close to reaching the 75% EU 2020 employment rate target. Notwithstanding a decrease to 72.4% in 2020, and each crisis having specific unique features, evidence from evaluation of previous PES interventions is that initiatives to retain labour market attachment and enhance skills are particularly effective as devices to support labour market recovery.

During COVID well-paid jobs have been least affected, whilst stability levels in atypical work are masking a rise in precarious work, with the most significant impact on the most vulnerable citizens at greatest risk from longer term labour market exclusion. The latter group however offer potential to address labour market shortages if offered necessary support.

An increase in precarious employment will require PES to target support at those most at risk of exclusion because of COVID. These will need to form part of an overall PES strategy to deliver programmes based upon the best possible analysis of labour market trends so that employer engagement and training programmes are configured to enable citizens to take best possible advantage of opportunities presented by the emerging knowledge based sustainable economy.

The most important issues to consider when preparing for the recovery according to PES³⁷ are digitalisation of services, integration of young people into the labour market, and counselling, initial skills profiling and skills assessment, coaching and guidance for jobseekers. These are closely followed by furthering digital skills amongst jobseekers, face-to-face counselling for groups for whom face-to-face contact is essential and supporting unemployed with severe and/or multiple employment barriers. These responses suggest that PES have made a sound analysis of the issues which they are facing in supporting the recovery. PES can therefore be strategically well positioned to ensure that resources and investment will be targeted to optimise their contribution to assist sustainable and inclusive labour market restructuring.

PES are reviewing their support measures and analytical capability both to continue providing tools for jobseekers to enable them to overcome short term barriers to integration, and to successfully manage more frequent transitions throughout their working lives. To succeed PES will need to learn from emergency measures applied during the crisis, identifying those which could be adopted for permanent use, consistently reviewing their institutional strength and corporate resilience. This will require agility with rapid responses to emerging trends, sufficient capacity, appropriate tools, and required competencies to support unemployed people through profound labour market changes.

PES stakeholder liaison will become increasingly important and need to be regularly reviewed to identify where new partnerships are needed. In this context it will be essential to ensure that employer engagement strategies can meet the contingencies of the post-COVID labour market.

³⁶ 13 *ibid.*

³⁷ 14 *ibid.*

The package of European recovery measures is crucial in providing funds to support the development of Member States' policies and offering policy guidance including from the EASE recommendation. Financial support, including from the Recovery and Resilience facility, will need to be directed towards structural reforms. These are necessary to embed longer term adjustment following the essential temporary approaches applied in an immediate response at the start of the pandemic.

PES will need to support improved labour market function through promoting employment in growing sectors of the economy, particularly digital and green jobs, facilitating occupational and geographical mobility, including through training and upskilling, and supporting the agenda for longer working lives. They will need to particularly prioritise the most vulnerable to ensure that policy instruments can have the optimum effect fostering both social and economic inclusion.

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