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European Vacancy Monitor

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- European Job Mobility Bulletin
- EU Employment and Social Situation Quarterly Review
- Employment Package

HIGHLIGHTS

DEVELOPMENT OF VACANCIES: Job vacancies declined overall, confirming continuing weak demand for labour

Total job vacancies in the third quarter of 2012 amounted to approximately 1.7 million (16 countries), representing a decrease of around -4 per cent on the same quarter in 2011. The decrease was -4 per cent in both private and public sector vacancies. Nevertheless there was variation between countries with one third showing increases over the period, though mostly small scale. The PES job vacancy inflow declined by around 10 per cent in the 17 countries covered over the period, with just four Member States (and Norway) registering increases. Demand for temporary agency workers weakened in the five countries covered by the Randstad data, falling by around 9 per cent in the last quarter of 2012.

Read more on page 3

JOB PROSPECTS FOR THE UNEMPLOYED: Opportunities to get hired continued to decrease

Short-term developments in hirings comparing the third quarters of 2011 and 2012 show a continued decline at -3 per cent. The unemployment rate continued to increase reaching 10.6 per cent in the third quarter of 2012 and this contributed to a higher unemployed-to-hirings ratio of 2.14 compared to 1.97 in the same quarter in 2011 and to 1.27 in 2008. Job prospects remained better with ratios at one or below in Austria and most of the Northern EU countries – comprising Denmark, Finland, the Netherlands and Sweden.

Read more on page 7

OCCUPATIONAL DEMAND: Labour demand continued to decline overall but not for professionals and service and sales workers

Only two of the nine main occupational groups showed increased hirings in the third quarter of 2012 compared to 2011. Professionals and service and sales workers increased by +2 per cent and +3 per cent respectively. For professionals this confirmed the medium-term trend of growth, demonstrating the consistent demand for these high-skilled workers. As in EVM8, both hirings and employment increased in certain high-skilled jobs related to administration, teaching, health care and engineering.

Job hirings were most numerous in the low to medium-skilled occupations such as '*shop salespersons*', '*domestic, hotel and office cleaners and helpers*', and '*waiters and bartenders*', with these three alone accounting for almost one in every three of all hirings in the Top 25 occupations. In the PES, those occupations with the highest inflows of vacancies required medium skills (equally distributed between manual and non-manual).

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EDUCATIONAL REQUIREMENTS:
By educational level hirings increased for those with post-secondary and tertiary education.

Although this is in line with the increased hirings of professionals, other literature indicates increasing employment of overqualified workers.

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• *TOP 10 growth in employment per country on page 18*
• *TOP 5 growth PES inflow per country on page 25*
• *TOP 5 in the EURES Job Mobility Portal on page 26*

TOP 5 growth employment

- Administrative and specialised secretaries
- Administrative professionals
- Business services and administration managers
- Client information workers
- Protective services workers

TOP 5 growth hirings

- Domestic, hotel and office cleaners and helpers
- Agricultural, forestry and fishery labourers
- Waiters and bartenders
- Manufacturing labourers
- Personal care workers in health services

PES TOP 5 growth occupations (vacancy inflow)*

- Police inspectors and detectives
- Administrative associate professionals
- Customs, tax and related government associate professionals
- Personal care and related workers
- Stall and market salespersons

**only 8 countries included*

INTRODUCTION

As part of its Europe 2020 flagship initiative 'An Agenda for New Skills and Jobs', in 2010 the European Commission (EC) launched the 'Monitoring Labour Market Developments in Europe' project. The objective of this project is to increase labour market transparency for all stakeholders who need information about recent developments on the demand side of the labour market, such as decision-makers in the fields of education and employment, public and private employment services including EURES advisers, education and training providers, career guidance services, and policy and labour market analysts.

The European Vacancy Monitor is a component of the European Commission's endeavour to develop a labour market monitoring system focusing on changes in the demand for skills including contractual arrangements, sector demand, occupational demand, growing occupations, hard-to-fill vacancies (bottleneck occupations) and skills requirements. Monitoring the activities of different recruitment agencies is important because they are at the interface of labour demand and supply, matching vacancies with suitable jobseekers in particular segments of the labour market. Results of the analysis are disseminated on a quarterly basis.

Other initiatives within this project include a second quarterly bulletin, the 'European Job Mobility Bulletin', and a biennial report, the 'European Vacancy and Recruitment Report' (EVRR).[1] Together with other relevant studies, labour market data and analyses, these form part of the European Commission's "Skills Panorama" launched in December 2012.

THE EUROPEAN VACANCY MONITOR (EVM)

The key sources of information for the EVM include European and national sources:

- the Labour Force Survey (data of recent job hirings for 27 countries) including a breakdown by sector, occupation, educational level and educational fields, as well as the relationship of unemployment to job hirings (a measurement of the tightness of the labour market), the Job Vacancy Statistics (vacancy data for 21 countries) including by sector, PES data for job vacancy inflow and registered unemployed (18 countries),
- data from a Temporary Work Agency (TWA) (5 countries) and Eurociett, the European Confederation of Private Employment Agencies.
- EVM provides regular updates on developments in the following aspects of labour demand:
  - Numbers of job vacancies and of job hirings (quarterly)
  - Inflow of newly registered vacancies with PES, also by occupational group (quarterly)
  - Recruitment demand in TWAs (quarterly)
  - Relationship between recruitment demand and supply (quarterly)
  - Occupational demand (quarterly)
  - Educational level (quarterly)
  - Educational field (annually)
  - Job vacancies by economic sector (annually)
  - Hard-to-fill ("bottleneck") vacancies (annually)

THE EUROPEAN JOB MOBILITY BULLETIN (EJMB)

The main sources of data analysis for the European Job Mobility Bulletin are

- Job vacancies uploaded by the PES to the European Job Mobility portal (EURES portal),
- The EURES database including a breakdown by sectors, occupations and skills.

The EURES database is currently being revised to increase the coverage of posts. For this reason, the ninth and following issues of the EJMB are limited to the EURES portal, until the completion of the revision of the EURES database which is expected December 2013.

THE EUROPEAN VACANCY AND RECRUITMENT REPORT (EVRR)

The biennial report is based upon the data analysis for the European Vacancy Monitor and further national labour market information and studies. In addition to the topics presented in the European Vacancy Monitor, the report focuses on the identification of 'top-growth occupations' with most recent recruits and of 'top bottleneck occupations' in Europe for which employers experience difficulties in filling their vacancies. It also provides an analysis of the development of market shares of recruitment agencies, in particular of PES and of TWAs.

In this issue, the charts have been slightly revised in two aspects:

- For a number of charts the presentation has been further refined.
- An increasing number of PES have switched from ISCO-88 classification of occupations to the newer ISCO-08 classification a year or longer ago. For this reason two versions of the PES chart on growth by occupation have been developed, to increase the coverage of countries on PES data.
- Corresponding to feedback from readers the EVM now focuses on vacancy development while data for hirings (LFS) will be further analysed in the European Vacancy and Recruitment Report 2014.
- In order to better present outcomes of demand for occupations and to better represent smaller countries, from now on the top rankings per country focus on employment growth by occupation.

The analysis of the demand for occupations is based on the International Standard Classification of Occupations (ISCO-08 for job hirings and a mix of ISCO-88 and ISCO-08 for PES data). To allow for international comparisons where necessary, some PES data on occupations have been harmonised with ISCO. The analysis of demand by educational level and field is based on the International Standard Classification of Education (ISCED).

Part 1
VACANCIES AND JOB PROSPECTS

1.1 TRENDS IN VACANCIES

Job vacancies stabilised at lower level for both public and private sectors

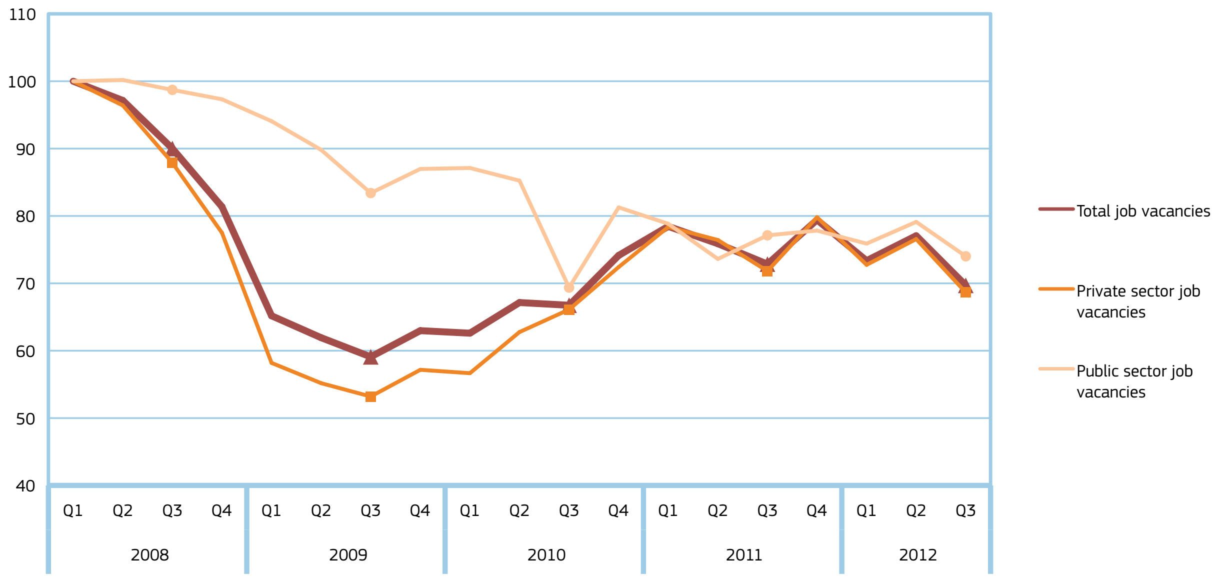
The index of job vacancies was hovering between 70 and 80 (base 100 at the start of 2008) for the past seven quarters and showed little sign of picking up in the third quarter of 2012. These overall figures are dominated by private sector job vacancies which account for around four out of every five recorded in the EU16 covered (Chart 1). In the third quarter of 2012 there was a convergence of the indices for private sector and public sector job vacancies following a period with a wide divergence from around the first quarter of 2008 to the second quarter of 2010. During this period private sector vacancies declined sharply in relation to the 2008 level and picked up from the third quarter of 2009 while public sector vacancies showed a slower but longer-lasting decline. However, the more recent figures showed that in the case of the private sector, the continuing poor economic conditions in most Member States contributed to low levels of recruitment overall, though some sectors have baulked the trend (for example health and social care which, while predominantly public sector has a growing private sector in many countries). In contrast, the slight improvement in the index for public sector job vacancies suggests that the effects of austerity measures on job losses lessened, or there was an increased replacement demand (due to retirements and other attrition – see Chart 6 for a discussion of this).

Job vacancies (Eurostat Job Vacancy Statistics)
Job vacancies refer to vacant paid posts (i.e. for employees), exclusive of internal vacancies (see Annex A3 for a full definition). Their number is measured by taking stock of the open vacancies at a certain moment of time. Chart 1 shows the changes over the period from the first quarter of 2008 (the base year) to the latest quarter (in this case the third quarter of 2012) in index form.

Following some grounds for optimism in EVM8 that job vacancies had started to pick up, the latest quarter's figures showed a small fall in the index and so repeated the pattern for the last six quarters (Chart 1). The overall fall in the index (of -4.3 in the third quarter of 2012) compares with a positive movement of 1.6 in the previous quarter of the same year. In addition, the separate figures for the private and public sectors showed similar sized movements in their indices.

This downturn in vacancy activity is consistent with the continuing weak economic conditions in the EU. For example, in the third quarter of 2012 real GDP in the EU27 grew by just 0.1 of a percentage point on the previous quarter, but on the previous year it was down by -0.4 of a percentage point[1]. Other indicators available for the EU27 showed mixed developments that tended to confirm an uncertain economic scenario.

Chart 1: Development of job vacancies (total, private, and public sector)
Index, 2008Q1 - 2012Q3, 2008Q1=100



Source: Eurostat, Job Vacancy Statistics - own calculations (16 countries): Bulgaria, the Czech Republic, Germany, Estonia, Greece, Cyprus, Latvia, Lithuania, Luxembourg, the Netherlands, Portugal (Portugal exclusive public administration), Romania, Slovenia, Slovakia, Sweden, the United Kingdom.
A job vacancy is defined as a paid post that is newly created, unoccupied, or about to become vacant.
Here, the public sector is defined as the total of four NACE sectors: 1. public administration, 2. education, 3. human health and 4. arts and other services. Due to data limitations, the private sector is defined as the rest of the economy exclusive agriculture. Agriculture is not in the total either.
Number of job vacancies in 2012Q3 (EU16, in thousands): total: 1,660; in private sector: 1,316; in public sector: 344.

The change in the index of job vacancies in the public sector seemed to be in line with expectations, given that austerity measures in most Member States affected job prospects as a result of cuts in public expenditure. Here the -4.4 year-on-year fall in the index for job vacancies is more consistent with these expectations than the previous quarter's 7.5 per cent increase, though looking back over the period since the start of 2009, the index has tended to fluctuate somewhat. However, confirming the downward trend, taken over a longer period (between the third quarters of 2009 and 2012) there was an overall fall of around -4.7 per cent in employment in the sector of public administration and defence in the EU27.

Job vacancies declined in most countries

Comparing the third quarters of 2012 and 2011, the stock of job vacancies increased in seven countries (Austria, the Czech Republic, Latvia, Lithuania, Luxembourg, Portugal and the United Kingdom) out of the 21 where information was available (Chart 2). In most cases the percentage increases were small and even in the three countries with the biggest short-term increases (Lithuania, Latvia and the Czech Republic), they still represented only one half or even less of their 2008 values for the third quarter. Furthermore, these increases follow changeable patterns in the stock of job vacancies in previous quarters for these countries (see EVM8) and so are not necessarily indicative of an established pattern. This is confirmed by the medium term developments (comparing the second quarter of 2012 with the same quarter in 2008) which show this volatility, except for Austria where the short and medium term figures were close to each other. Of these seven countries, the Austrian labour market seems to be affected least by the crisis, and managed to maintain a low level of unemployment over the period (4.5 per cent in September 2012) and with little change in youth unemployment (at 9.0 per cent in September 2012).

For those countries showing falls in the number of job vacancies, the majority (nine out of 14) had decreases of less than -10 per cent but five countries had falls above this -10 per cent threshold (namely Cyprus, Greece, the Netherlands, Slovenia and Spain), and of these, Cyprus and Greece had significantly high falls of 56 and 65 per cent respectively. These two countries have been severely affected by the crisis, a factor also reflected in their medium term trends in the number of job vacancies. In fact, the latest change figures comparing the third quarters of 2012 and 2011 show some small improvement, though this cannot be taken as an indication of any sustained improvement in labour market conditions. Unemployment rates were high in both countries, with 26 per cent in Greece (September 2012) and 13 per cent in Cyprus and even higher levels of youth unemployment (58 per cent in Greece and 27 per cent in Cyprus).

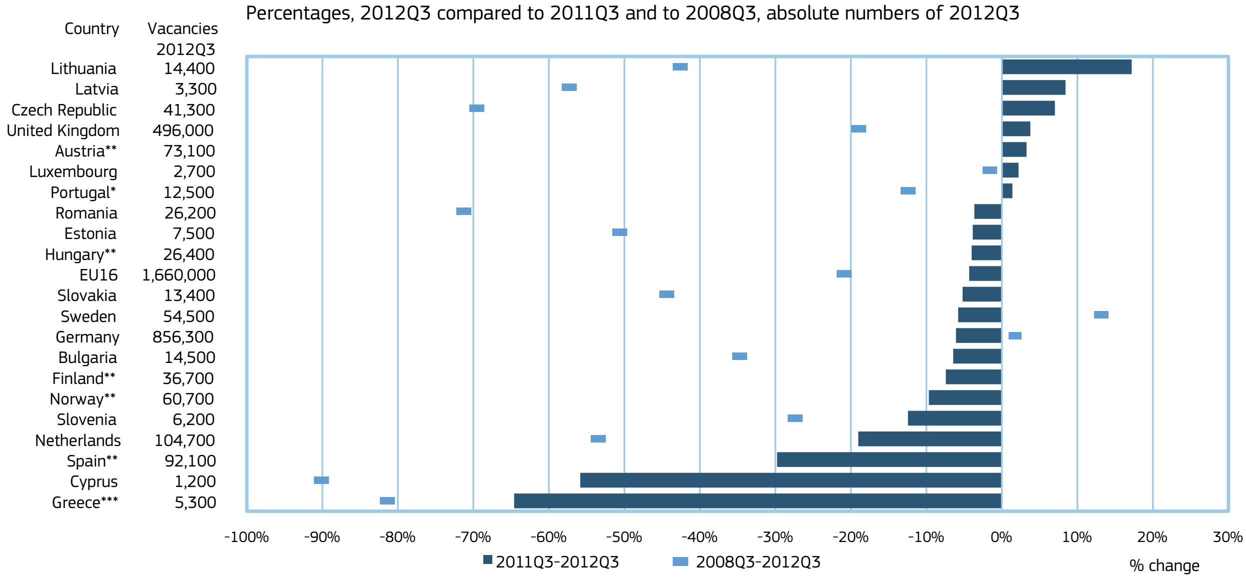
Comparing the short-term changes in the stock of job vacancies, it is possible to group the 21 countries according to how they fared comparing the third quarters of 2012 and 2011 and this is presented below:

- Growth (> +5 %) — The Czech Republic, Latvia and Lithuania
- Relatively stable (≥-5 % and < +5 %) — Austria, Estonia, Hungary, Luxembourg, Portugal, Romania, Slovakia and the United Kingdom
- Decline (≤ -5 %) — Bulgaria, Cyprus*, Finland, Germany, Greece*, the Netherlands*, Norway, Slovenia*, Spain* and Sweden

Note: in the countries marked with '' the decrease was over 10%.*

The above groupings contain some noteworthy entries. For example, in the group of countries with declining job

Chart 2: Development of job vacancies
Percentages, 2012Q3 compared to 2011Q3 and to 2008Q3, absolute numbers of 2012Q3



Source: Eurostat, Job Vacancy Statistics - own calculations (21 countries). Countries included in the EU16 total: Bulgaria, the Czech Republic, Germany, Estonia, Greece, Cyprus, Latvia, Lithuania, Luxembourg, the Netherlands, Portugal, Romania, Slovenia, Sweden, Slovakia, the United Kingdom. A job vacancy is defined as a paid post that is newly created, unoccupied, or about to become vacant.
** For Portugal public administration is excluded due to missing 2011Q3 data.*
*** Changes for Austria, Finland, Hungary, Norway and Spain are only shown for 2011Q3-2012Q3, due to missing values for 2008Q3. The EU16 total for 2011Q3-2012Q3 does not include these four EU-countries and Norway.*
**** For Greece the method of weighting sectors was adjusted which resulted in a more stable time series but also in higher values for 2011Q3*
Number of job vacancies (EU16, in thousands): in 2008Q3: 2,144; in 2011Q3: 1,735; in 2012Q3: 1,660.

vacancies in the short-term were Germany, Norway and Sweden, countries where their labour markets up to then have been least affected by the crisis, suggesting a halt to hitherto favourable developments over the medium-term, as is confirmed by available data for Germany and Sweden.
In the group of countries with relatively stable vacancy developments, all had significant negative growth in the stock of job vacancies in the medium-term, with the sole exception of Luxembourg with just a -2 per cent fall between the third quarters of 2008 and 2012. This suggests a temporarily stable labour market situation at lower vacancy levels.
The three countries with growth of greater than 5 per cent in the stock of vacancies (the Czech Republic, Latvia and Lithuania) shared some common characteristics in terms of those sectors driving this growth between the third quarters of 2012 and 2011. In all three cases job vacancy growth was spread across manufacturing, construction and services, and with public and private sector vacancies contributing to the increases. However, in Lithuania the business services sectors grew particularly well, though construction was also a strong performer. In Latvia, service sector growth was more pronounced, with manufacturing and construction creating fewer new vacancies.

Weakening or unstable labour demand reflected in PES vacancy inflow in many countries

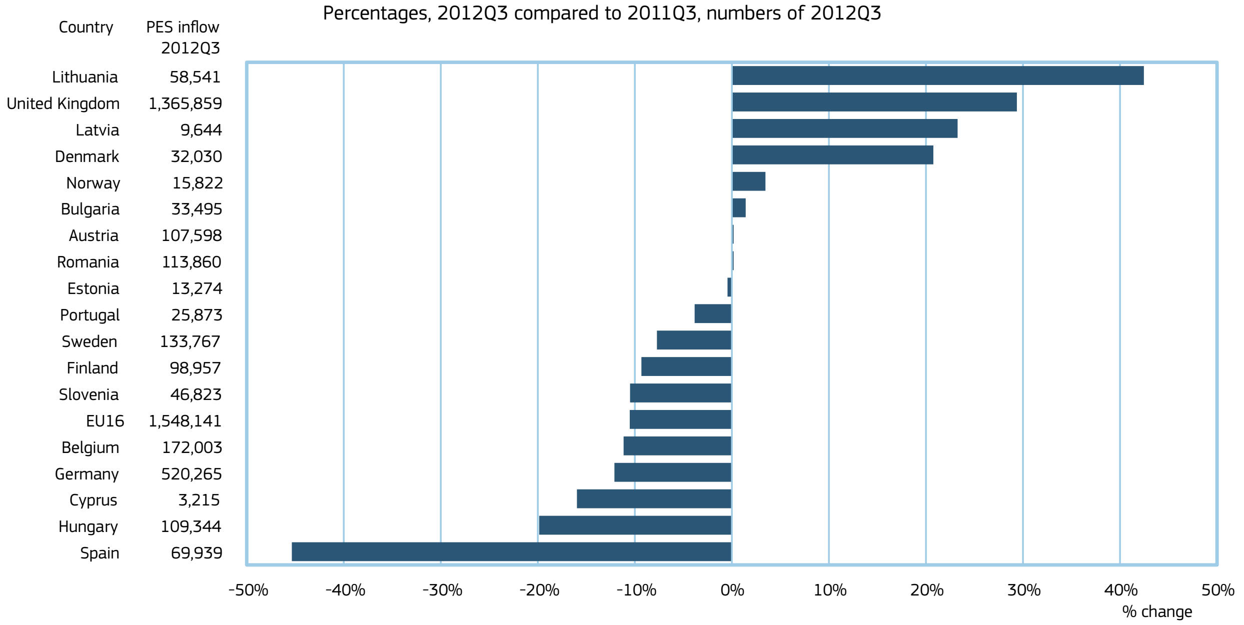
Excluding the UK the PES inflow declined by 10 per cent in the remaining EU16 (Chart 3). The UK figures have been excluded as they alone accounted for almost 49 per cent of the total inflow in the third quarter of 2012[2]. Therefore, in considering the overall EU developments the UK figures have been excluded. Following on from this the PES inflow declined by 10 per cent in the remaining EU16. However, just three countries besides the UK (Denmark, Latvia and Lithuania) still showed an increased inflow of PES job vacancies between the third quarters of 2011 and 2012. Otherwise the trend has been relatively stable in six countries and declining in the other eight countries.

According to the year-on-year PES inflow changes, the countries can be grouped as follows:

- Growth (> + 5 %) — Denmark, Latvia, Lithuania
- Relatively stable (≥ -5 % and < +5 %) — Austria, Bulgaria, Estonia, Norway, Portugal, and Romania
- Decline (< -5 %) — Belgium, Cyprus, Finland, Germany, Hungary, Slovenia, Spain, and Sweden

Spain experienced a particularly large fall of -45 per cent, further reducing the overall number of vacancies notified to PES to just under 70,000 in the third quarter of 2012, a small number in relation to the size of the country. A similar situation prevailed in Cyprus where a much smaller fall of -16 per cent in the inflow of PES vacancies was accompanied by a relatively small overall number of vacancies in the third quarter of 2012. As such the PES inflow figures broadly confirm the development of the more encompassing JVS job vacancies (Chart 2) and in both series two countries, Latvia and Lithuania (here the United Kingdom also appears positive in both charts but is excluded because of the inflated PES figures on the inflow of vacancies) stand out as the only two countries with positive changes in both indicators. Furthermore, these are two of only three Member States which showed significant positive economic growth over the period. For example, in Latvia in the third quarter of 2012 GDP grew by 5.2 per cent on the previous year, while in Lithuania the increase was 3.4 per cent. This compares with negative growth in the EU27 of -0.4 of one percentage point and with only Estonia coming close to the other Baltic countries with an increase in GDP of 3.7 per cent. In the case of Denmark, the other significant contributor to the small overall growth in PES job vacancies inflow, improvements in the economy are less explanatory of the improvement with zero growth in GDP between the third quarters of 2012 and 2011.

Chart 3: Development in PES vacancy inflow
Percentages, 2012Q3 compared to 2011Q3, numbers of 2012Q3



Source: PES - own calculations (18 countries): Austria, Belgium, Bulgaria, Cyprus, Germany, Denmark, Estonia, Spain, Finland, Hungary, Lithuania, Latvia, Norway, Portugal, Romania, Sweden, Slovenia and the United Kingdom.
Since the PES inflow in the United Kingdom was almost as high as in the other 16 EU countries combined, UK was left out of the total figure.
PES inflow refers to new job vacancies which have been registered in a certain quarter.
PES inflow (EU16 excl. Norway and the United Kingdom, in thousands): in 2011Q3: 1,730; in 2012Q3: 1,548.

The better performance of the labour markets in two Baltic States can be attributed to a number of factors and one of the most significant is the mobility of the population. During the crisis these countries saw increased economic migration to other Member States in search of work and this is likely to have restricted the availability of labour when their economies started to pick up (according to the GDP figures). Recruiting employers in such a situation will tend to use all means to secure their labour needs and this includes using the PES, hence the increased inflow of vacancies in Latvia and Lithuania, and Estonia in the previous quarter (see EVM8).

Weakening demand for temporary agency workers continues

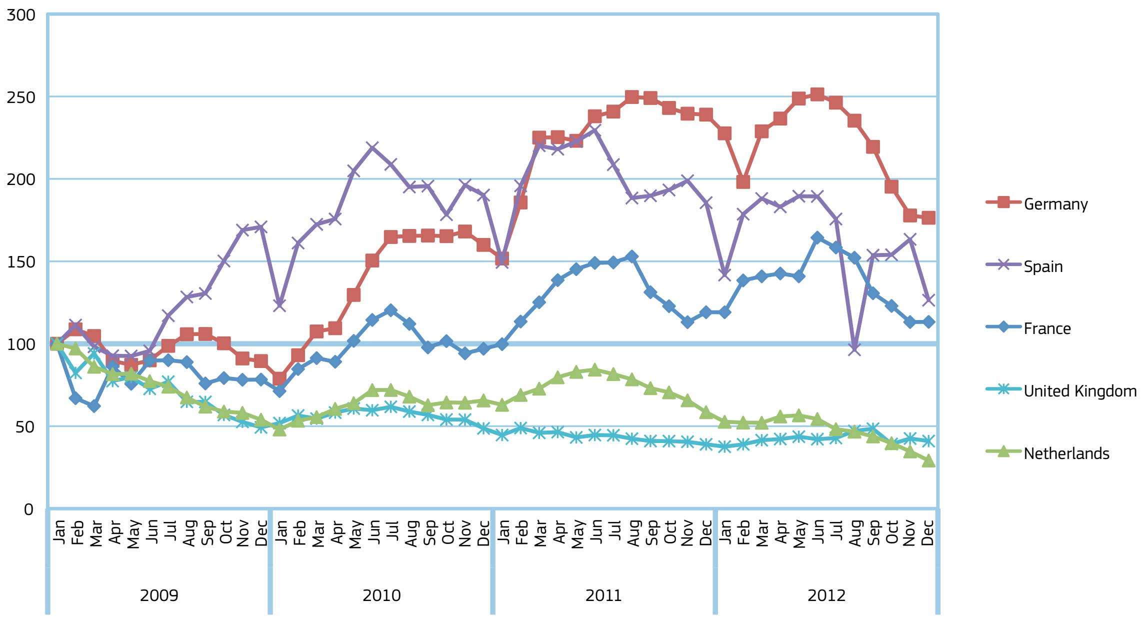
According to the Randstad figures, the downturn in the demand for temporary agency workers that started in the third quarter of 2012 continued in the final quarter of the year. Furthermore, demand in the Netherlands and the United Kingdom registered small declines following a period of less volatility than in the other countries shown (France, Germany and Spain - Chart 4). These trends reflected the continuing low levels of economic activity in these Member States that is also evident in the job vacancy data already discussed.

As discussed in EVM8, while the Randstad data are relatively up-to-date, they only cover a small part of the total temporary work agency market which, in Europe alone, is estimated to account for around 1.6 per cent of the volume of total employment. As such, reference to the wider CIETT annual economic reports[3] is useful to gain a wider perspective. Here the recently published report for 2012 shows that the temporary agency sector in Europe[4] began to decline in the first quarter of 2012 following a short period of recovery that began in 2010. This is confirmed by the Eurociett figures on the number of hours worked[5] by agency workers in Europe (tracked since 2008 and referred to in the CIETT report). These show that demand for temporary agency work fell from the beginning of 2008 to the second quarter of 2010, followed by a brief recovery that lasted until the first quarter of 2012, after which decline set in once again, though not as marked as in 2009.

As an indicator of labour market fortunes, the number of hours worked by agency workers is considered to some extent to reflect the prevailing economic conditions, since it responds more quickly to changes in labour demand. As such, comparing September 2012 to the same month in the previous year, shows that in the EU27 the number of hours worked by agency workers fell by -9.2 per cent while the increase in unemployment was of a similar (though opposite) magnitude (+8.9 per cent). Furthermore, the decline in GDP for the EU27 over the same period was -0.4 per cent. Of course these are figures for the EU as a whole and different Member States will have different experiences, to some extent depending on their use of agency workers. This is evident in the five countries represented in Chart 4, for example, with three (France, Germany and Spain) with indices still above the base at the start of 2009, while the remaining two (the Netherlands and the United Kingdom) still well below.

The CIETT report also provides a useful insight into the profile of the temporary agency workers. In Europe well over half (57 per cent) are aged under 30 and the fact that opportunities for agency work have declined is likely to have a detrimental effect on opportunities for young people to enter the labour market at a time of high youth unemployment.

Chart 4: Development of job vacancies in temporary work agencies (Randstad)
Index, January 2009 - December 2012, January 2009 = 100



Source: Randstad (5 countries). The index is based on the number of open 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.
Number of Randstad vacancies December 2012: France: 6,667; Germany: 7,205; the Netherlands: 3,029; Spain: 904; the United Kingdom: 7,542.

1.2 JOB PROSPECTS

Job hirings (based on Eurostat Labour Force Survey - LFS)
For job hirings LFS data are used on employees in a 'reference week' who had started working for an employer at the most three months earlier – this excludes contract renewals. For a person who started multiple jobs within the same quarter, only the last hire is counted. Statistical offices often define such persons as job-finders according to different national definitions. Eurostat uses the neutral term "time since job started". Job hirings reflect completed recruitment even if no formal vacancies had been posted.
The ratio of unemployed to job hirings indicates the relative ease of hiring, or the relative competition for jobs among unemployed. An increase in the ratio can be due to increasing unemployment, decreasing job hirings or both. Differences in the ratio between countries may reflect not only differences in shortages or surpluses, but also differences in job search requirements (affecting the number of unemployed) and labour market flexibility (affecting the number of job hirings).

Job prospects deteriorated overall due mainly to increased unemployment - though some countries fared better than others

For the EU27 the ratio of unemployed to hirings increased in the third quarter of 2012 to 2.14, representing just over two unemployed persons for each person hired. This deteriorating ratio reflects the continuing lack of economic growth in the EU27 which has seen unemployment increase to 10.6 per cent at the end of the third quarter of 2012 compared to 7.1 per cent in 2008. This was an increase in the ratio of 1.91 in the same quarter of 2011 and considerably higher than in 2008 when it was 1.27 (Chart 5). The EU north-south divide observed in the figures in EVM8 remained intact, with Malta the only exception among the group of countries comprising those with the lowest ten ratios.

The short-term increase in the ratio for the EU27 has been driven by adverse changes in both hirings and unemployment, though an increase in the numbers unemployed was the dominant factor. Between the third quarters of 2011 and 2012, the numbers unemployed increased by around 9.2 per cent whereas the number of hirings fell by -2.6 per cent, suggesting that there was a continuing shakeout of labour. This same trend is also confirmed by the medium-term figures which show that between the third quarters of 2008 and 2012, unemployment numbers increased by around 52.1 per cent while hirings fell by -10.1 per cent.

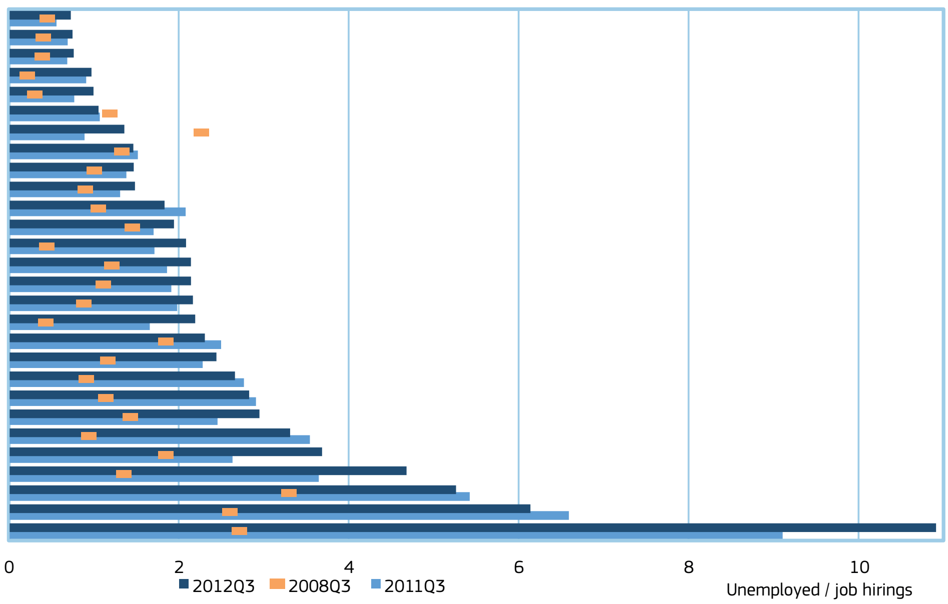
Grouping the countries according to the range of ratios for the third quarter of 2012 shows just five countries with ratios of 1.0 or under and the biggest group (comprising over half the Member States) was that with ratios of more than 2.0.

- Ratio of 1.0 or under: Austria, Denmark, Finland, the Netherlands and Sweden
- Ratio of over 1.0 and to 2.0: Belgium, Estonia, France, Germany, Luxembourg, Malta and the United Kingdom
- Ratio of more than 2: Bulgaria, Cyprus, the Czech Republic, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Poland, Portugal, Romania, Slovakia and Spain

The majority of Member States with the lowest ratios (i.e. under 1.0) were Nordic countries.
The continuing increase in the numbers unemployed can be attributed to job losses in both the public and private sectors. However, the implementation of austerity measures in many Member States is particularly affecting the loss of public sector jobs. This is confirmed by figures in the latest EU Employment and Social Situation Quarterly Report (March

Chart 5: Ratio of unemployed to hirings
Ratios, 2012Q3, 2011Q3 , 2008Q3, and absolute numbers of 2012Q3

Country	Unemployed 2012Q3 (x1,000)	Hirings 2012Q3 (x 1,000)
Austria	192	262
Finland	192	255
Sweden	378	494
Denmark	214	220
Netherlands	450	451
Germany	2,281	2,158
Luxembourg	14	11
Malta	12	8
Estonia	66	45
France	2,779	1,870
United Kingdom	2,536	1,383
Belgium	379	195
Slovenia	93	45
Czech Republic	366	171
EU27	24,616	11,476
Latvia	141	65
Cyprus	53	24
Hungary	457	198
Poland	1,714	701
Bulgaria	392	147
Lithuania	182	64
Italy	2,474	838
Ireland	324	98
Portugal	868	235
Spain	5,771	1,233
Romania	688	131
Slovakia	371	60
Greece	1,228	113



Source: Eurostat, LFS - own calculations (27 countries).
Unemployed: unadjusted, age 15-65.

2013) which shows that between the third quarters of 2009 and 2012, employment in public administration and defence fell by -4.7 per cent in the EU27. However, the job losses were not evenly distributed with 17 of the 27 Member States experiencing falls (Belgium, Czech Republic, Denmark, Ireland, Greece, Spain, France, Italy, Cyprus, Latvia, Lithuania, the Netherlands, Austria, Portugal, Romania, Finland and the United Kingdom) ranging from -1.0 per cent in Austria to -17.1 per cent in Portugal. For the remaining nine Member States, employment in public administration and defence actually increased over the period, ranging from +0.4 per cent in Germany to +20.7 per cent in Luxembourg.

In some countries where there was growth in employment in the public sector, they were still represented in the list of Member States with comparatively high ratios of unemployed to hirings. These included Bulgaria, Hungary, Latvia, Lithuania, Poland and Slovakia, all of which had ratios in excess of 2.0 in the third quarter of 2012. This suggests that their ratios have been affected more by falls in private sector jobs and so increasing unemployment.

Part 2 OCCUPATIONS

2.1 RECRUITMENT DEMAND FOR OCCUPATIONS

Despite overall decline, demand continues to grow for service and sales workers and professionals

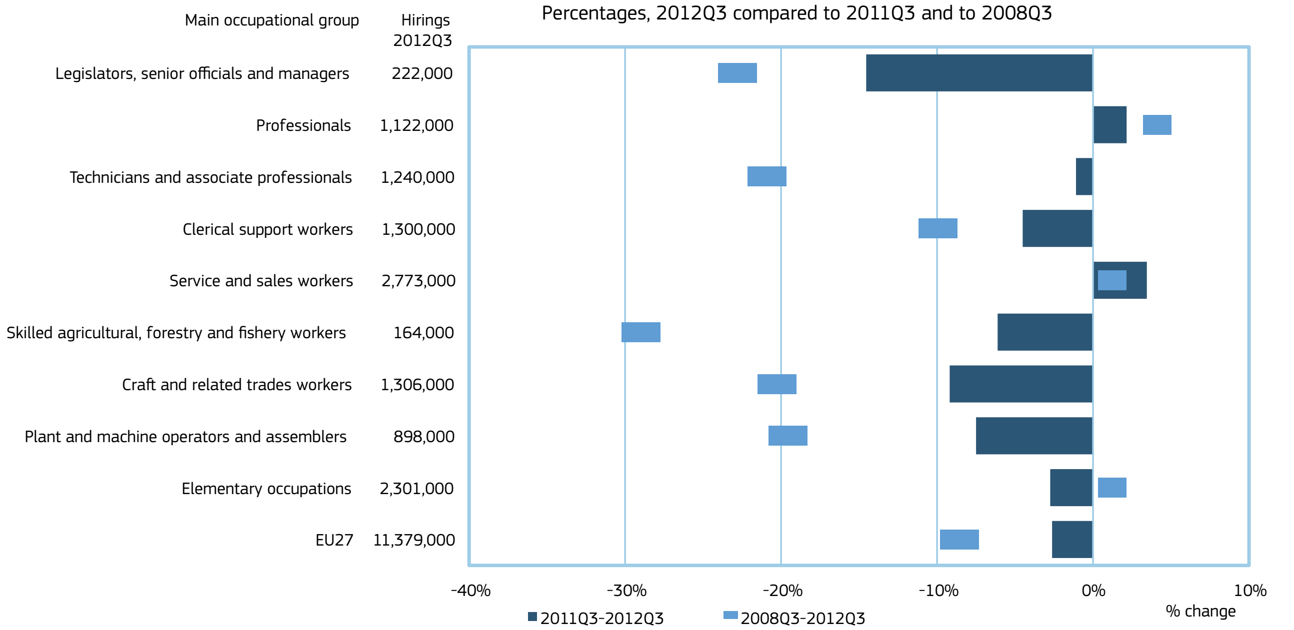
According to the number of hirings, the demand for labour in the EU27 continued its overall decline in the third quarter of 2012 with a fall of around -3 per cent compared to the same quarter in 2011, consolidating a fall of -10 per cent over the medium term (Chart 6). Across the nine main occupational groups only two, '*professionals' and 'service and sales workers*', increased, by +2 per cent and +3 per cent respectively. For the 'professionals' occupational group, this confirmed the medium-term trend of growth, with an increase of +5 per cent between the third quarters of 2012 and 2008, demonstrating the consistent demand for these higher skilled workers. For '*service and sales workers*', the positive short-term growth drew the medium-term trend into positive territory for the first time, registering just a one per cent increase, but nevertheless providing evidence of the durability of recruitment demand in this occupational group.

However, this growth in '*sales workers*' in particular may seem at odds with the developments in consumer spending over both the short and medium-terms. According to one relatively consistent indicator of consumer activity[6], in the EU27 consumer spending actually fell in the third quarter of 2012 compared to the same quarter in 2011, and furthermore this was the second consecutive quarterly fall following a sustained period of growth over the past three years. In the EU27, comparing the third quarters in 2012 and 2011, household expenditure fell by -1.6 per cent and this followed a -2.4 per cent fall in the previous period (second quarters of 2012 and 2011), though the experience of different countries varied. Out of the EU27, 16 Member States recorded some positive growth and another 11 negative growth. Among the larger countries only Germany saw household expenditure increase (up by 0.8 per cent) and this is consistent with in an increase in service and sales occupations over the same period.

Elsewhere, using this measure household expenditure declined in Spain by -5.3 per cent, Italy by 4.6 per cent, the United Kingdom by -3.3 per cent and in France by -0.6 per cent. In contrast, it was the countries of Central and Eastern Europe that continued to show the strongest rate of increase in household consumption.

These apparently contradictory developments of falling household expenditure and increasing hirings in '*service and sales workers*' can to some extent be explained by the comparatively high level of labour turnover in this occupational group. With significant numbers of low skilled jobs, entry and exit is relatively easy and workers may move between employers in search of better terms and conditions. Similarly, these jobs are often used by young people as a transition from education to employment and so serve a very useful route for helping reduce youth unemployment and inactivity. Therefore, the buoyancy of job opportunities in service and sales workers may not be due to the creation of incremental jobs but to the normal churn in this occupational group.

Chart 6: Development in hirings by main occupational group (ISCO)
Percentages, 2012Q3 compared to 2011Q3 and to 2008Q3



Source: LFS data by ISCO 1 digit level - own calculations (26 countries, 27 for total). Ireland is included in the total but not in the breakdown by main occupational group due to partial non-response on ISCO for 2011Q3. Total is inclusive Ireland, armed forced and non-response (together 150,000). From 2011, the ISCO-08 classification is used in the LFS, in 2008 the ISCO-88 classification was used.
Job hirings: employees who were employed in a 'reference week' and had started working for their employer at most three months earlier.

For the remaining seven occupational groups, their short-term decline in hirings over the third quarters of 2012 and 2011 was consistent with the medium-term developments, with the exception of 'elementary occupations'. In the third quarter of 2012 hirings in elementary occupations fell by -3 per cent against the medium-term trend (still just positive at +1 per cent). Here the changes in hirings in elementary occupations can be explained to some extent by their mostly low-skilled nature. This permits relatively easy entry and exit to these jobs and so generates higher than average levels of labour turnover. Therefore, although not necessarily creating incremental jobs, it does provide a valuable route into the labour market for new entrants and re-entrants.

The -15 per cent fall in hirings for '*legislators, senior officials and managers*', is the largest of the seven declining occupations. This group comprises a high proportion employed in the public sector and so the fall is likely to reflect the effects of widespread cuts in public expenditure. However, in terms of overall volatility, '*skilled agricultural, forestry and fishery workers*' have shown most change over the short and medium-terms, though the number of hirings represents a very small proportion of the total (1.4 per cent in the third quarter of 2012).

High-skilled occupations continue to dominate the Top25 for employee growth

Top 25 occupational growth

The top 25 occupations are determined by comparing numbers per ISCO category (at 3-digit level) of the third quarter of 2012 compared to the same quarter of 2011. Occupations are ranked by absolute growth rather than percentage change to avoid the numerically smallest occupations always ending on top, or using arbitrary minimum thresholds for selecting larger occupations. To provide a more comprehensive picture of the development of skills demand, this section provides following top 25 occupations:

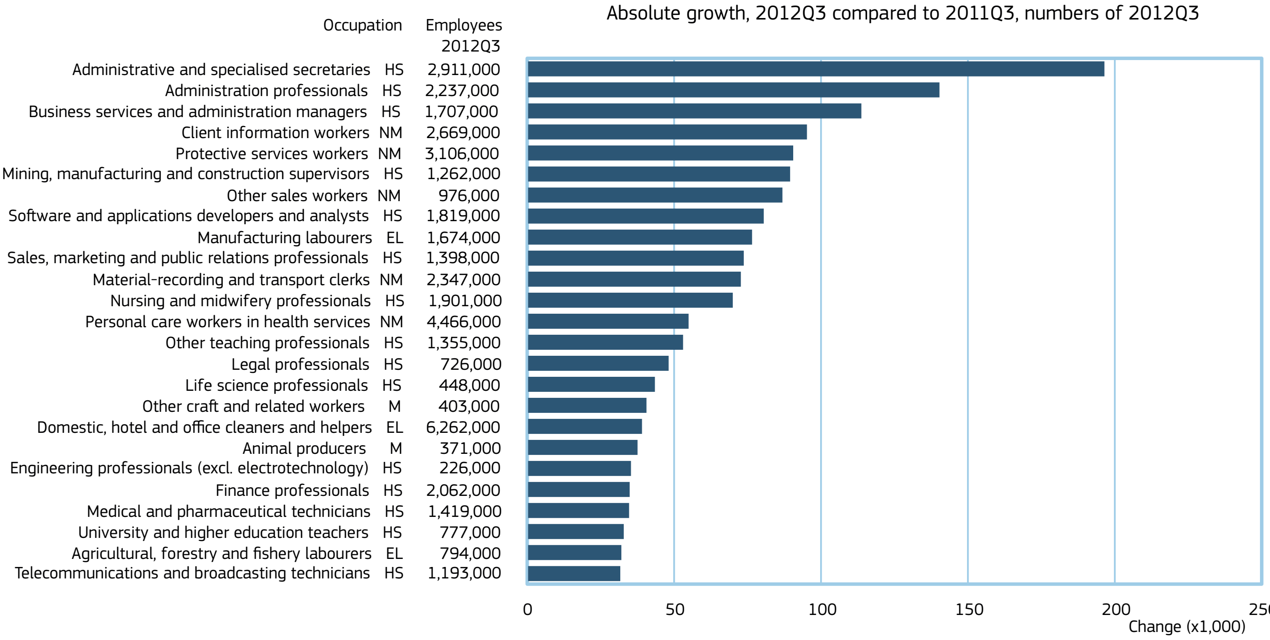
1. growth in employment (where are increasing numbers of workers needed?)
2. growth in hirings (where are hirings increasing, including those to replace workers leaving employment?)
3. most recent hirings (where is recruitment demand high even if not increasing?)

Similar to the situation reported in EVM8, the high-skilled occupations dominated the Top 25 in terms of increased employee numbers between the third quarters of 2012 and 2011 (Chart 7). Among the 13 listed (see below), a high proportion are principally employed in the service sectors such as health, teaching and the law, though other occupations such as '*software and applications developers and analyst*', and '*finance professionals*' can be found across all sectors of industry. Other high-skilled occupations that grew over the reference period such as '*life science professionals*' and '*engineering professionals (excluding electro technology)*', are likely to be concentrated in more specialised sectors of industry.

The Top 25 occupations by growth in employee numbers aggregated by skills level comprised 15 high-skilled, five skilled non-manual occupations, two skilled manual occupations and three elementary occupations. The occupation with the highest proportion of employees in the third quarter of 2012 was '*domestic, hotel and office cleaners and helpers*', which fell into the elementary category, though other occupations accounting for large proportions of employees were to be found in all skills categories.

By comparing this ranking in employee absolute growth with that in EVM8 some interesting changes can be highlighted. For high-skilled occupations there were 15 identified in EVM8 compared to 15 in the latest quarterly figures, though only

Chart 7: Top 25 growth occupations (ISCO-08) - employees
Absolute growth, 2012Q3 compared to 2011Q3, numbers of 2012Q3



Source: Eurostat, LFS data by ISCO-08 3 digit level - own calculations (25 countries).
Germany is excluded due to changes in the coding of occupations in 2012 and Ireland due to partial non-response on ISCO for 2011Q3.
Occupations are indicated with broad skills levels:
EL = Elementary (ISCO 9); M = Skilled manual (ISCO 6-8);
NM = Skilled nonmanual (ISCO 4-5); HS = high-skilled (ISCO 1-3).

13 occupations are common to both. The two occupations falling from the list in the latest quarter were: '*secondary education teachers*'; and '*other health professionals*'. The two that replaced them in the latest quarter were: '*life science professionals*' (e.g. biologists, pathologists) and '*telecommunications and broadcasting technicians*'. However, the main differences are to be found further down the skills hierarchy. For example, there are fewer skilled non-manual occupations in the latest quarter (five compared to nine), more skilled manual (two compared to none) and more elementary (three compared to one). This would suggest that labour demand for skilled non-manual occupations fell in the latest quarter and increased for skilled manual and lower-skilled elementary workers, though some of this change may be caused by seasonal changes in demand.

Top 25 growing occupations comprised ten high-skilled jobs

The top 25 occupations for hirings provide more detail about where the principal occupational changes in demand occurred. Only two main occupational groups recorded growth in the number of hirings over the period between the third quarters of 2012 and 2011, '*professionals*' and '*service and sales workers*' (up by 2 per cent and 3 per cent respectively). Looking in more detail at the sorts of occupations covered by these main groups within the Top 25 growth occupations for hirings (Chart 8), the professionals list is dominated by those in health with four high-skilled occupations included (see below). Technical occupations accounted for a further two, followed by one each from administrative and teaching.

Service and sales worker formed the second broad group showing most overall growth in hirings over the period, and this mostly comprised skilled non-manual occupations such as '*shop salespersons*' (also the most numerous number of hirings among the Top 25 in the third quarter of 2013 accounting for almost 12 per cent of the total), and '*waiters and bartenders*'. However, the Top 25 occupation with the most numerous hirings in the third quarter of 2012, '*domestic, hotel and office cleaners and helpers*' (with 10.5 per cent of the total Top 25 hirings) falls into the elementary skills category. Aggregated by skills level the Top 25 growth occupations were as follows: high-skilled (ten occupations), skilled non-manual (eight occupations), skilled manual (four occupations) and elementary (three occupations).

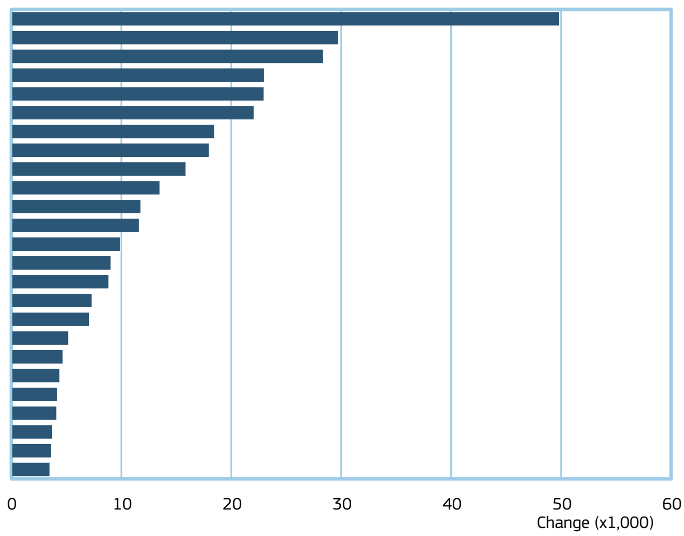
Comparing the growing occupations in terms of employee numbers (Chart 7) with those as measured by number of hirings (Chart 8) shows some differences. These differences could be taken as an indication that if there has been no overall growth in employee numbers in the occupation in addition to growth in hirings, then much of the recruitment activity is likely to have been due to recruitment for labour turnover rather than incremental demand (i.e. the creation of new jobs).

The following eleven occupations appeared in the Top 25 hirings but not in the Top 25 by employee numbers growth:
High- skilled (6 occupations) – *'legal, social and religious associate professionals', 'other health associate professionals', 'medical doctors', 'nursing and midwifery associate professionals', 'manufacturing, mining, construction and distribution managers'*
Skilled Non-Manual (4 occupations) – *'childcare workers and teachers' aides', 'shop salespersons', 'waiters and bartenders', and 'cooks'*
Skilled Manual (2 occupations) – *'mixed crop and animal producers', 'garment and related trade workers'.*

There were fourteen occupations appearing in both the Top 25 for hirings and the Top 25 for employee growth between the third quarters of 2012 and 2011 and are grouped below

Chart 8: Top 25 growth occupations (ISCO-08) - hirings
Absolute growth, 2012Q3 compared to 2011Q3, numbers of 2012Q3

Occupation		Hirings 2012Q3	Y-o-y change*
Domestic, hotel and office cleaners and helpers	EL	592,000	=
Agricultural, forestry and fishery labourers	EL	300,000	=
Waiters and bartenders	NM	514,000	=
Manufacturing labourers	EL	241,000	=
Personal care workers in health services	NM	369,000	=
Client information workers	NM	221,000	=
Administrative and specialised secretaries	HS	110,000	↑
Protective services workers	NM	176,000	=
Legal, social and religious associate professionals	HS	59,000	=
Other sales workers	NM	125,000	↑
Other health associate professionals	HS	42,000	=
Shop salespersons	NM	664,000	=
Medical doctors	HS	50,000	=
Other craft and related workers	M	32,000	↑
Other teaching professionals	HS	81,000	=
Life science professionals	HS	19,000	↑
Cooks	NM	174,000	=
Mixed crop and animal producers	M	12,000	↑
Garment and related trades workers	M	33,000	=
Manufacturing, construction, and distribution managers	HS	32,000	=
Animal producers	M	18 000	↑
Engineering professionals (excl. electrotechnology)	HS	70,000	=
Child care workers and teachers' aides	NM	150,000	=
Nursing and midwifery professionals	HS	47,000	=
Nursing and midwifery associate professionals	HS	44,000	↓



Source: Eurostat, LFS data by ISCO-08 3 digit level - own calculations (25 countries). Germany is excluded due to changes of coding occupations in 2012 and Ireland due to partial non-response on ISCO for 2011Q3.
Job hirings: employees who were employed in a 'reference week' and had started working for their employer at most three months earlier.
Occupations are indicated with broad skills levels:
EL = Elementary (ISCO 9); M = Skilled manual (ISCO 6-8); NM = Skilled nonmanual (ISCO 4-5); HS = high-skilled (ISCO 1-3).
** Year-on-year change employees: ≤ -5% (↓); > -5% and ≤ +5% (=) ; > +5% (↑).*

according to skills group:
High-skilled (5 occupations) – *'administrative and specialised secretaries'; 'other teaching professionals';' life sciences professionals'; 'engineering professionals (excluding electro-technology)'; 'nursing and midwifery associate professionals'*
Skilled Non-Manual (4 occupations) – *'personal care workers in health services'; 'client information workers'; 'protective services workers'; 'other sales worker'*
Skilled Manual (2 occupations) – *'other craft and related workers; animal producers'*
Elementary (3 occupations) – *'domestic, hotel and office cleaners and helpers'; 'agricultural, forestry and fishery labourer'; 'manufacturing labourers'*
For these occupations, which range across the skills categories, featuring in both lists tends to indicate that the increased hiring activity is likely to be due to both recruitment for reasons of labour turnover and incremental recruitment. If this pattern was sustained over a longer period then this could be indicative of rising demand for these occupations.

Increasing employment and hirings for specialised secretaries and sales workers

Job hirings in low to medium-skilled occupations were most numerous in the EU27 in the third quarter of 2012. These included occupations such as '*shop salespersons*', '*domestic, hotel and office cleaners and helpers*', and '*waiters and bartenders*', with these three alone accounting for almost one in every three of all hirings in the Top 25 occupations (Chart 9). Furthermore, these three occupations have been prominent in all previous quarters and this fact underlines their importance in creating employment opportunities though these overall figures say nothing about the quality of the jobs created in these occupations, which are more likely to be part-time, temporary, requiring unsocial working hours and with low pay.

Job quality is less likely to be an issue in the next most numerous occupations in the Top 25 of hirings, '*personal care workers in health services*', which accounted for around seven per cent of all the Top 25 hirings during the reference period, thus providing an important source of jobs in the labour market.

When comparing the changes in hirings between the third quarters of 2012 and 2011, only two occupations increased their positions in the Top 25 ranking. The first of these, '*other sales workers*' is classed as skilled non-manual, and the second, '*administrative and specialised secretaries*' as

Chart 9 Top 25 occupations with most recent hirings
With ranking, indication of employees growth, and numbers of 2012Q3

Ranking 2012Q3	Occupations (ISCO-08, 3-digit level)	Skills level	Employee y-o-y change*	Hirings y-o-y change*	2012Q3 job hirings
1	Shop salespersons	Skilled NM	=	=	664,000
2	Domestic, hotel and office cleaners and helpers	Elementary	=	↑	592,000
3	Waiters and bartenders	Skilled NM	=	↑	514,000
4	Personal care workers in health services	Skilled NM	=	↑	369,000
5	Agricultural, forestry and fishery labourers	Elementary	=	↑	300,000
6	Building frame and related trades workers	Skilled M	↓	↓	267,000
7	Manufacturing labourers	Elementary	=	↑	241,000
8	Transport and storage labourers	Elementary	=	↓	239,000
9	Client information workers	Skilled NM	=	↑	221,000
10	Mining and construction labourers	Elementary	↓	↓	198,000
11	Food preparation assistants	Elementary	=	=	184,000
12	Protective services workers	Skilled NM	=	↑	176,000
13	Cooks	Skilled NM	=	=	174,000
14	Heavy truck and bus drivers	Skilled M	=	↓	167,000
15	Child care workers and teachers' aides	Skilled NM	=	=	150,000
16	Building finishers and related trades workers	Skilled M	=	↓	130,000
17	Sales and purchasing agents and brokers	High	=	↓	130,000
18	Cashiers and ticket clerks	Skilled NM	=	↓	126,000
19	Other sales workers	Skilled NM	↑	↑	125,000
20	Physical and engineering science technicians	High	=	↓	123,000
21	Material-recording and transport clerks	Skilled NM	=	↓	118,000
22	Mobile plant operators	Skilled M	=	↓	114,000
23	Other elementary workers	Elementary	↓	↓	112,000
24	Administrative and specialised secretaries	High	↑	↑	110,000
25	Other clerical support workers**	Skilled NM	=	↓	106,000
	Total top 25* **				**5,648,000**
	Total ***				**9,127,000**

** «=» change > -5% and ≤ +5%; ↑ increase > +5%; ↓ decrease ≤ -5%.*
*** UK is excluded for this occupation due to apparent inconsistencies in coding various clerical occupations into ISCO-08.*
**** Totals exclusive Germany, Ireland and non-response*
Skilled NM = skilled non-manual; skilled M = skilled manual.

high-skilled. However, both occupy the lower positions in the rankings and so the absolute numbers are relatively small. In fact for 20 of the 25 occupations there was no year-on-year change in their position in the rankings suggesting a fairly stable demand composition picture as far as the mix of occupations is concerned.

Other occupations that can be considered industry-specific include those related to the construction sector. For example, in the third quarter of 2012 the combined hirings for the three occupations of '*building frame and related trades workers*', '*mining and construction labourers*', and '*building finishers and related trades workers*' was 595,000 accounting for just over one in ten of the total Top 25 hirings. However, two of the three occupations saw the year-on-year figures fall, reflecting the problems in the construction industry in many parts of Europe stemming from being one of the early sector casualties of the downturn and with slow recovery since. One particular problem in accurately measuring employment in the construction sector is the high levels of self-employment among workers in many Member States which, according to the LFS, was around one quarter of all employment in the sector in the third quarter of 2012. This means that figures for both employees and hirings will tend to significantly understate the true extent of both employment and recruitment activity in the sector.

Nine of the Top 25 occupations with the most hirings in the third quarter of 2012 also featured in the Top 25 growth occupations according to the number of employees (Chart 7). These covered a mix of different skills levels as indicated below:

High skilled (one occupation) – *'administrative and specialised secretaries'*

Skilled non-manual (5 occupations) – *'personal care workers in health services', 'client information services', 'protective services workers', 'other sales workers', 'material-recording and transport clerks'*

Skilled manual (no occupations)

Elementary (3 occupations) – *'domestic, hotel and office cleaners and helpers', 'agricultural, forestry and fishery labourers', and 'manufacturing labourers'.*

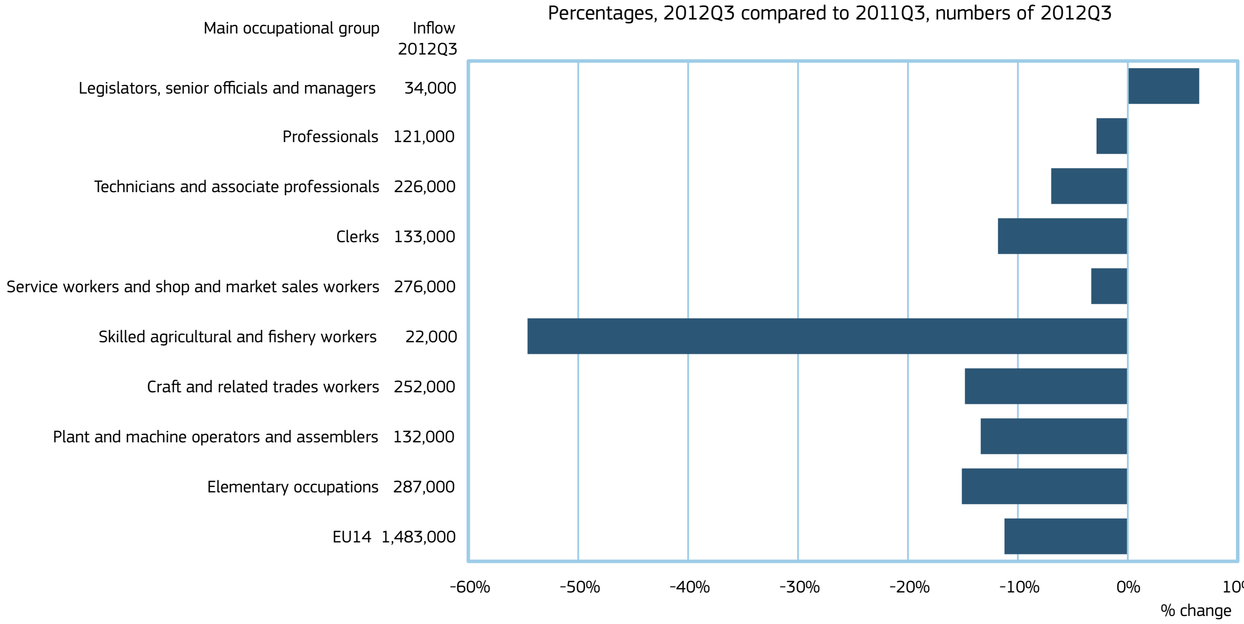
The majority of the occupations in this list are either skilled non-manual or elementary and this confirms the more consistent growth in these occupations, sometimes in contrast to the growth performance of the sectors they are mostly employed in.

2.2 PES VACANCY INFLOW BY OCCUPATION

The inflow of PES vacancies shows decline in all but one occupational group

As Chart 3 indicated, in the EU16 countries covered by the statistics, the inflow of PES vacancies decreased by around 10 per cent between the third quarters of 2012 and 2011. The PES inflow job vacancy information in Chart 10 covers two fewer countries (excluded are Bulgaria, Denmark besides the UK[7]) and showed a different overall change for the group of 14 EU countries, with a decrease between the third quarters of

Chart 10: Development in PES vacancy inflow by main occupational group (ISCO)
Percentages, 2012Q3 compared to 2011Q3, numbers of 2012Q3



Source: PES by ISCO, 1-digit, 14 countries, own calculations. Countries included (with ISCO-88 or ISCO-08 classification between brackets): Austria (88), Belgium (88), Cyprus (88), Estonia (08), Finland (88), Germany (88), Hungary (88), Latvia (08), Lithuania (88), Portugal (88), Romania (08), Slovenia (08), Spain (08), Sweden (88).*
** EURES database used.*
PES inflow refers to new job vacancies which have been registered in a certain quarter.

2012 and 2011 of around 11 per cent. Looking in more detail at the changes by broad occupation all fell with the exception of legislators, senor officials and managers which increased by around seven per cent over the period. Of the declining occupations, by far the largest fall was in skilled agricultural and fishery workers (down by around -55 per cent, though this occupation formed only a very small part (around 1.5 per cent) of the total vacancy inflow in the third quarter of 2012. Elementary occupations formed the highest proportion of PES vacancies in the quarter accounting for almost one-in-five of the total and this group saw double-digit decline. Other occupations with almost as many vacancies (technicians and associate professionals, service workers and shop and market sales assistants, and craft and related workers) also saw significant falls, though service workers and shop and market sales assistants fell the least, buy around 4 per cent.

This tends to reflect a picture of negative growth in PES job vacancies which is similar with the development in hirings (Chart 6) which shows growth between the third quarters of 2012 and 2011 in just two occupational groups, 'professionals', and 'services and sales workers'. This is despite a smaller coverage of countries in the PES data (14 as opposed to 27 in the hirings figures) and between the two, the main difference is the performance of sales workers – they grew in hirings but fell in PES vacancies, albeit by the second lowest proportion of all nine occupational groups.

Nevertheless, the notification of vacancies will tend to reflect the real demand for workers since the figures are not based on estimates or surveys but are actual figures and so the decrease in most occupational groups is a significant negative development. The most numerous inflow of job vacancies was spread among the different skills categories such as '*service workers, shop and market sales workers*', and '*elementary occupations*' which, combined, accounted for over two out of every five vacancies. However, high-skilled groups such as '*professionals*', and '*legislators, senior officials and managers*' represented well over one in ten vacancies, which are not far off the same shares for these groups in the figures for hirings. The inflow of PES vacancies in '*skilled agricultural and fishery workers*' fell sharply by almost half between the third quarters of 2012 and 2011and this compares with a much less severe fall in the previous quarter's figures. Some of this change will be due to seasonal effects with demand for workers tailing off in the autumn, especially in those countries with comparatively large agricultural sectors (and represented in the PES figures) such as Portugal and Romania. In Portugal, for example, around 11 per cent of total employment was in agriculture and in Romania around 33 per cent, which compares with very low figures in countries such as Sweden and the United Kingdom with 2.0 and 1.3 per cent respectively[8]. However, in terms of the numerical inflow, PES vacancies in this sector represented a very small (under one per cent) of the total.

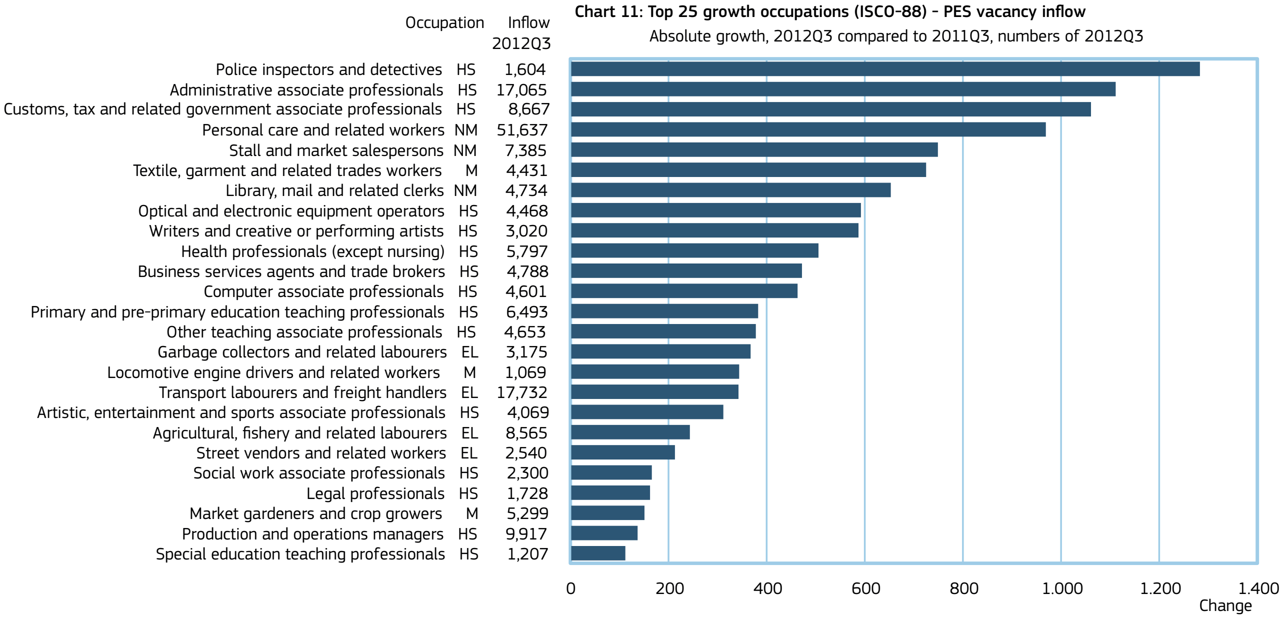
Top growth PES inflow vacancies are mostly among the higher to medium skilled occupations

The PES vacancy inflow data showing the Top 25 growth occupations is presented in two charts reflecting the availability of national data according to the different International Standard Classification of Occupations (ISCO) used. Therefore, Chart 11 covers eight countries using ISCO-88 (Austria, Belgium, Cyprus, Germany, Finland, Lithuania, Portugal and Sweden) and Chart 11b covers four countries using ISCO-08 (Estonia, Spain, Latvia and, Slovenia[9]). Splitting the analysis in this way enables information to be presented on more countries.

Taking developments in the eight countries (Chart 11) first, those occupations with the greatest increase in PES vacancy inflows between the third quarters of 2012 and 2013 were mostly high-skilled (forming six of the Top 10) and skilled non-manual (with three occupations in the Top 10). The high-skilled occupations included '*administrative associate*

Chart 11: Top 25 growth occupations (ISCO-88) - PES vacancy inflow

Absolute growth, 2012Q3 compared to 2011Q3, numbers of 2012Q3



Source: PES by ISCO-88, 3-digit, own calculations (8 countries): Austria, Belgium, Cyprus, Germany, Finland, Lithuania, Portugal, Sweden.
PES inflow refers to new job vacancies which have been registered in a certain quarter.
Occupations are indicated with broad skills levels: EL = Elementary (ISCO 9);
M = Skilled manual (ISCO 6-8); NM = Skilled nonmanual (ISCO 4-5); HS = high-skilled (ISCO 1-3).

professionals', and '*customs, tax and related government associate professionals*' which together accounted for around 14 per cent of the total PES inflow in the third quarter of 2012. These groups are mostly employed in the public sector and so the positive trend seems at odds with the cuts in public expenditure widespread in Member States at the time. It is worth to note that the top growth occupation of '*police inspectors and detectives*' is largely due to a recruitment drive in Belgium (and specifically Walloon) where a pool of appropriate candidates was identified, though without all being hired and so is not indicative of any upsurge in demand for this occupation elsewhere.

In addition, the occupational group with the most numerous inflows among the Top 25 in the third quarter of 2012, '*personal care and related workers*' (accounting for around 28 per cent of the total), is also heavily dependent on the public sector (though with a growing private provision in many countries) but this is consistent with increasing demand for these services through demographic change and other factors. Therefore it is likely that a significant part of this increase in vacancies inflow is due to the creation of new jobs, which is consistent with the growth in employees in that occupation identified in Chart 7.

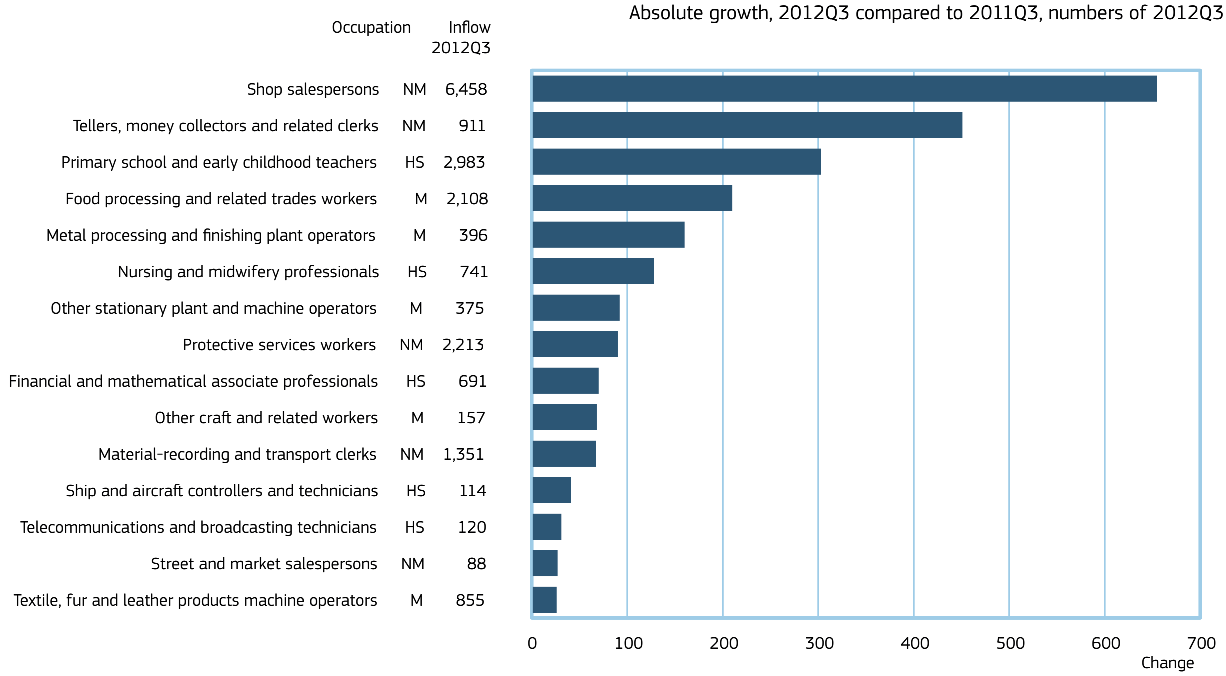
The second most numerous occupation for the inflow of PES vacancies in the third quarter of 2012 was '*transport labourers and freight handlers*', representing almost one in ten vacancies. Other intermediate level skilled occupations are also present in the list for example, '*market gardeners and crop growers*' (2.8 per cent of the total inflow), '*textile, garment and related trades workers*' (2.4 per cent), and '*optical and electronic equipment operators*' (1.6 per cent).

The presence of lower skilled occupations in the Top 25 is limited to four, namely '*transport labourers and freight handlers*', '*garbage collectors and related labourers*', '*agricultural, fishery and related labourers*', '*street vendors and related workers*', which together accounted for around 17 per cent of the total inflow in the third quarter of 2012. This is in contrast to their representation in the labour force as a whole, where elementary occupations constitute much more significant proportions of total employment.

Nevertheless, the PES vacancy inflow fell in six of the eight countries between the third quarters of 2012 and 2011 the exceptions being Austria, where there was no change, and Lithuania where it grew by over 40 per cent (see Chart 3). Therefore, while the Top 25 occupations displayed some growth, overall the demand for workers (as proxied by the PES inflow figures) has not grown for the aggregate of this group of eight countries.

For the group of four countries represented in Chart 11b the change of inflow between the third quarters of 2012 and 2011 shows a different profile of the Top 10 occupations from that in Chart 11. There are five high-skilled occupations ('*primary school and early childhood teachers', 'nursing and midwifery professionals', and 'financial and mathematical associate professionals', 'ship and aircraft controllers and technicians', 'telecommunication and technicians' broadcasting and broadcasting*') and then five skilled non-manual ('*shop salespersons', 'tellers, money collectors, and related clerks', 'protective services workers', 'metal recording and transport clerks' and 'street and market salespersons'*), and five skilled manual ('*food processing and related trades workers', 'metal processing and finishing plant operators', 'other stationery plant and machine operators', 'other craft and related workers' and 'textile, fur and leather products machine operators*'). For these four countries, those occupations with the most numerous vacancy inflows in the Top 15 were '*shop salespersons', 'primary school and earl childhood teachers*' and

Chart 11b: Top 15 growth occupations (ISCO-08) - PES vacancy inflow
Absolute growth, 2012Q3 compared to 2011Q3, numbers of 2012Q3



Source: PES by ISCO-08, 3-digit - own calculations; 4 countries included: Estonia, Spain, Latvia and Slovenia.
PES inflow refers to new job vacancies which have been registered in a certain quarter.
The listing of occupations with highest growth of PES inflow is limited to the first 15 here, due to small numbers (below 50) further down the ranks.
Occupations are indicated with broad skills levels: EL = Elementary (ISCO 9);
M = Skilled manual (ISCO 6-8); NM = Skilled nonmanual (ISCO 4-5); HS = high-skilled (ISCO 1-3).

'*protective services workers*', the three together accounting for approximately three in every five of the PES vacancy inflow in the third quarter of 2012.

Top 25 PES inflow vacancies in absolute number shows a varied skills profile

Further examination of skills levels of PES vacancy inflows based on the most numerous notified in the third quarter of 2012 suggest a somewhat more mixed ranking according to skills levels and takes account of the relative size of these occupational groups in the overall labour force (Chart 12). So, for example, while high-skilled occupations are still represented, they no longer dominate the list and medium-level skills, both manual and non-manual, make up the majority. Significantly, elementary level skills account for only three of the Top 25 places. Overall there are seven high-skilled occupations, seven skilled non-manual, and eight skilled manual, in addition to the three elementary occupations. The highest place went to a high-skilled occupational group, '*finance and sales associate professionals*' which had around one in every ten PES inflow vacancies in the total of the Top 25. However, the next position for a high-skilled occupation was at number 12, '*physical and engineering science technicians*', with just over 3 per cent of the total Top 25 inflow. In between these two there was a mixture of skilled non-manual (such as '*housekeeping and restaurant services workers*', and '*personal care and related workers*'), and skilled manual occupations (such as '*motor vehicle drivers*', and '*building finishers and related trades workers*') with just one elementary occupation ('*manufacturing labourers*'). Significantly only one occupational group (high-skilled '*administrative associate professionals*') increased its numbers in the Top 25 of the third quarter of 2012 compared to the same quarter in 2011. Otherwise seven maintained the same position and the remainder fell with mixed fortunes for all skills groups.

The developments in the Top 25 occupations with the higher PES vacancy inflows tend to be more in line with the overall changes for the eight countries covered, with six of the eight recording falls in inflows between the third quarters of 2012 and 2011 and including Germany which drives the changes due to its high representation in the totals.

Chart 12 **PES top 25 occupations with highest recent vacancy inflow (ISCO-88)**
With indication of growth and numbers of 2012Q3

	Occupations (ISCO-88, 3-digit level)	Skills level	Change compared to 2011Q3 *	2012Q3 PES inflow
1	Finance and sales associate professionals	High	↓	79,553
2	Housekeeping and restaurant services workers	Skilled NM	=	72,911
3	Shop salespersons and demonstrators	Skilled NM	=	71,473
4	Manufacturing labourers	Elementary	↓	58,961
5	Personal care and related workers	Skilled NM	=	51,637
6	Domestic and related helpers, cleaners and launderers	Elementary	=	39,274
7	Motor vehicle drivers	Skilled M	↓	34,763
8	Machinery mechanics and fitters	Skilled M	↓	34,691
9	Material-recording and transport clerks	Skilled NM	↓	33,635
10	Building finishers and related trades workers	Skilled M	↓	30,185
11	Other office clerks	Skilled NM	↓	29,066
12	Physical and engineering science technicians	High	↓	26,611
13	Electrical and electronic equipment mechanics and fitters	Skilled M	↓	25,385
14	Architects, engineers and related professionals	High	↓	21,661
15	Metal moulders, welders, sheet-metal workers, structural-metal preparers, and related trades workers	Skilled M	↓	21,059
16	Building frame and related trades workers	Skilled M	↓	20,409
17	Painters, building structure cleaners and related trades workers	Skilled M	↓	18,086
18	Transport labourers and freight handlers	Elementary	=	17,732
19	Administrative associate professionals	High	↑	17,065
20	Agricultural and other mobile plant operators	Skilled M	↓	16,918
21	Secretaries and keyboard-operating clerks	Skilled NM	↓	16,862
22	Other personal services workers	Skilled NM	↓	16,395
23	Computing professionals	High	↓	13,571
24	Nursing and midwifery associate professionals	High	=	13,075
25	Business professionals	High	=	13,050
	Total top 25			**794,028**
	Total			**1,120,219**

Source: PES - own calculations (8 countries): Austria, Belgium, Cyprus, Germany, Finland, Lithuania, Portugal, Sweden.
Skilled NM = skilled non-manual; skilled M = skilled manual.
** «=» change > -5% and ≤ +5%; ↑ increase > +5%; ↓ decrease ≤ -5%.*

Part 3 EDUCATIONAL REQUIREMENTS

Short-term trend in hirings by education level generally conforms to medium-term developments

The short-term trend in hirings by educational level is for the most part consistent with the medium-term trends in that the lower levels have continued to fall, while hirings for those with higher levels of education have risen. The change in hirings between the third quarters of 2012 and 2011 declined the most among those with upper secondary short courses, down by – 16 per cent, though they only accounted for around 1 per cent of the total hirings in the third quarter of 2012. Those with primary education fell by -13 per cent, though again only made up a small proportion (5 per cent of the total). The most numerous hirings were of those with formal upper secondary education, representing 46 per cent of all hirings and this slipped back less (by -3 per cent) which helped improve the slightly worse medium-term figures, bringing it to just below -10 per cent. (See Chart 13)

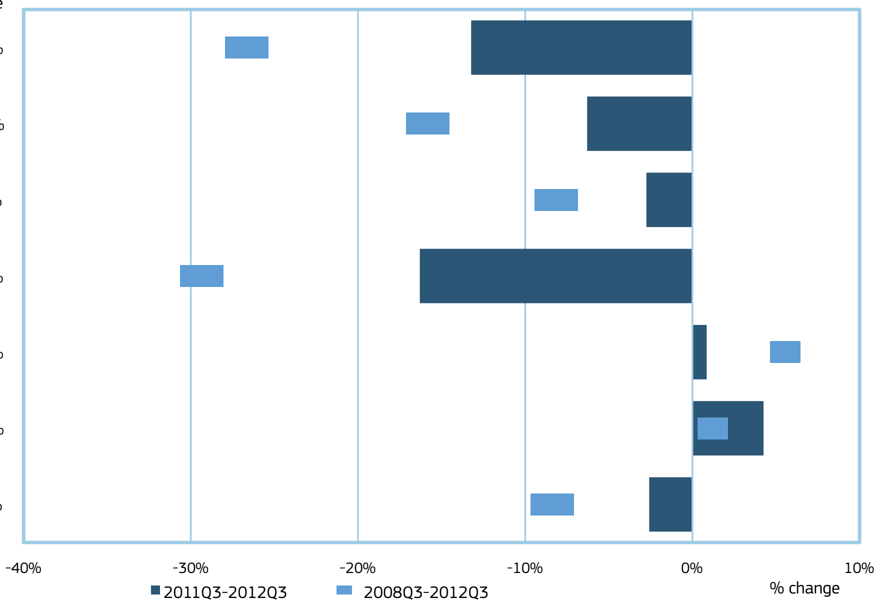
By contrast, those with post-secondary non-tertiary education saw a small one per cent increase in hirings over the short-term, which helped pull the medium-term trend into positive territory. A similar trend is evident in the more numerous tertiary educational level, which accounted for almost one in four of all hirings in the third quarter of 2012, with a short-term increase of +4 per cent and a medium-term increase of +2 per cent.

However, as explained in EVM8, the causes of this apparent increase in hirings of higher educated recruits may not necessarily be due to a real demand for such levels from employers, though skills levels are tending to increase for many jobs. Nevertheless, it is also the case that in periods of weak demand for labour, employers may choose to trade up to higher skilled jobseekers even though they may not strictly require their higher educational levels to adequately perform the job. Similarly, in these circumstances jobseekers may tend to reduce their own requirements and settle for a job not necessarily commensurate with their qualifications. This is a particular problem for young people making the transition from education to the labour market, as pointed out in the latest Eurydice education statistics report. It noted that 'the results show that a growing number of young people appear to be overqualified for the type of employment they find'[10].

Chart 13: Development in hirings by educational level (ISCED)

Percentages, 2012Q3 compared to 2011Q3 and 2008Q3, absolute numbers of 2012Q3

Educational level	Hirings 2012Q3	% share
Primary Education	532,000	5%
Lower Secondary	2,321,000	20%
Formal upper secondary	5,294,000	46%
Upper secondary short courses	164,000	1%
Post secondary non tertiary	375,000	3%
Tertiary	2,756,000	24%
EU27	11,443,000	100%



Source: Eurostat, LFS - own calculations (27 countries). Exclusive 34,000 non-response on educational level (0.3%) for the educational levels. In the EU27 non-response is included.
Job hirings: employees who were employed in a 'reference week' and had started working for their employer at most three months earlier.

Part 4 TOP OCCUPATIONS PER COUNTRY

4.1 TOP 10 GROWTH OCCUPATIONS PER COUNTRY – EMPLOYEES

How to read the table

The top 10 absolute growth occupations of employees (based on the Eurostat Labour Force Survey, 2011Q3-2012Q3) is presented for 23 countries and the EU25. For each top growth occupation, the number of employees in the third quarter of 2012 is shown together with the change compared to the third quarters of 2011. The occupations are based on the ISCO-08 classification of occupations, at 3-digit level.

Changes with a * indicate numbers with limited reliability. If less than 10 occupations are presented, this does not necessarily mean that employment has increased in less than 10 occupations, but that no significant increase could be identified for 10 occupations. When employment would expand again in the future, it is to be expected that significant growth can be identified for 10 occupations in all or perhaps nearly all countries.

Germany is excluded due to changes of coding occupations in 2012. Ireland is excluded due to partial non-response on ISCO for 2011Q3. Germany and Ireland are not included in the EU25 total either. For Latvia and Lithuania no significant growth occupations could be identified. For this reason Latvia and Lithuania are included in the EU25 but no separate listing is presented for these two countries.

Top 10 growth occupations per country

	EU25	Employees	Change
1	Administrative and specialised secretaries	2,910,500	196,500
2	Administration professionals	2,237,500	140,300
3	Business services and administration managers	1,706,500	113,700
4	Client information workers	2,669,300	95,200
5	Protective services workers	3,105,700	90,500
6	Mining, manufacturing and construction supervisors	1,261,600	89,500
7	Other sales workers	976,200	86,900
8	Software and applications developers and analysts	1,818,700	80,500
9	Manufacturing labourers	1,673,900	76,500
10	Sales, marketing and public relations professionals	1,397,900	73,700

	Austria	Employees	Change
1	Administrative and specialised secretaries	120,200	+19,600
2	Other health associate professionals	43,600	+18,500
3	General office clerks	180,100	+18,200
4	Physical and engineering science technicians	154,500	+13,700
5	Numerical clerks	73,000	+10,800
6	Building finishers and related trades workers	74,900	+10,200
7	Sales, marketing and development managers	44,000	+9,900
8	Engineering professionals (excluding electrotechnology)	32,300	+9,500
9	Child care workers and teachers' aides	32,100	+9,400
10	Sales, marketing and public relations professionals	24,400	+8,200

Top 10 growth occupations per country

	Belgium	Employees	Change
1	Material-recording and transport clerks	117,800	+35,500
2	Administrative and specialised secretaries	93,300	+32,200
3	Mining, manufacturing and construction supervisors	78,900	+25,200
4	Nursing and midwifery professionals	60,700	+23,900
5	Secretaries (general)	76,500	+23,100
6	Manufacturing, mining, construction, and distribution managers	46,700	+22,600
7	Business services and administration managers	67,400	+20,600
8	Sales, marketing and development managers	68,100	+17,800
9	Numerical clerks	98,600	+16,800
10	Mobile plant operators	46,200	+12,500

	Bulgaria	Employees	Change
1	Protective services workers	152,600	+16,800
2	Heavy truck and bus drivers	95,000	+11,400*
3	Other elementary workers	59,500	+10,000*
4	Manufacturing labourers	51,800	+9,700*
5	Other clerical support workers	27,700	+6,100*
6	Information and communications technology operations and user support technicians	16,600	+5,500*
7	Cashiers and ticket clerks	25,200	+5,500*

Top 10 growth occupations per country

	Cyprus	Employees	Change
1	Secretaries (general)	9,200	+4,800
2	Cashiers and ticket clerks	8,200	+4,400
3	Shop salespersons	20,400	+2,300
4	Domestic, hotel and office cleaners and helpers	35,600	+2,200
5	Waiters and bartenders	8,800	+2,100
6	Physical and engineering science technicians	4,000	+1,700
7	Food preparation assistants	3,600	+1,700
8	Building finishers and related trades workers	5,500	+1,500
9	Client information workers	6,200	+1,500
10	University and higher education teachers	2,500	+1,400

	Czech Republic	Employees	Change
1	Nursing and midwifery professionals	52,200	+15,600
2	Primary school and early childhood teachers	60,400	+12,400
3	Machinery mechanics and repairers	91,500	+7,200
4	General office clerks	50,400	+6,100
5	Other clerical support workers	61,000	+6,000
6	Managing directors and chief executives	19,200	+5,900
7	Engineering professionals (excluding electrotechnology)	39,100	+5,700
8	Personal care workers in health services	52,400	+5,300
9	Mining, manufacturing and construction supervisors	66,900	+5,200
10	Manufacturing labourers	89,500	+4,900

Top 10 growth occupations per country

	Denmark	Employees	Change
1	Administration professionals	56,500	+9,800
2	Cashiers and ticket clerks	50,000	+8,900
3	Physical and engineering science technicians	76,300	+8,500
4	Sales, marketing and public relations professionals	18,900	+8,500
5	Building and housekeeping supervisors	33,600	+7,600
6	Software and applications developers and analysts	48,100	+7,600
7	Transport and storage labourers	66,300	+6,000*
8	Car, van and motorcycle drivers	16,700	+6,000*
9	Other teaching professionals	51,300	+5,800*
10	Nursing and midwifery professionals	60,300	+5,600*

	Estonia	Employees	Change
1	Mobile plant operators	15,500	+4,100
2	Chemical and photographic products plant and machine operators	3,600	+3,000
3	Architects, planners, surveyors and designers	5,800	+2,900
4	Secondary education teachers	10,600	+2,500
5	Refuse workers	8,700	+2,400

Top 10 growth occupations per country

	Finland	Employees	Change
1	Sales, marketing and public relations professionals	39,800	+15,900
2	Engineering professionals (excluding electrotechnology)	51,500	+8,500
3	Software and applications developers and analysts	60,600	+7,300
4	Mining, manufacturing and construction supervisors	21,700	+7,000
5	Other teaching professionals	28,300	+6,100
6	Sales and purchasing agents and brokers	46,200	+5,500
7	Administrative and specialised secretaries	33,600	+4,600
8	Child care workers and teachers' aides	56,400	+4,200
9	Cashiers and ticket clerks	18,600	+4,100
10	Process control technicians	10,200	+3,700*

	France	Employees	Change
1	Manufacturing labourers	352,900	+57,400
2	Engineering professionals (excluding electrotechnology)	580,300	+56,200
3	Nursing and midwifery professionals	205,300	+54,300
4	Other craft and related workers	114,700	+49,800*
5	Domestic, hotel and office cleaners and helpers	1,503,900	+49,500*
6	Administrative and specialised secretaries	698,700	+41,500*
7	Business services and administration managers	658,400	+40,200*
8	Physical and engineering science technicians	811,800	+38,500*
9	Child care workers and teachers' aides	773,400	+35,800*
10	Material-recording and transport clerks	427,500	+35,500*

Top 10 growth occupations per country

	Greece	Employees	Change
1	Sales, marketing and development managers	21,300	+11,000
2	Cooks	34,400	+7,100
3	Tellers, money collectors and related clerks	46,600	+5,900
4	Administration professionals	26,800	+5,800
5	Cashiers and ticket clerks	19,700	+5,700
6	Other health associate professionals	13,000	+4,200
7	Nursing and midwifery professionals	11,000	+3,900*
8	Business services and administration managers	13,600	+3,600*
9	Authors, journalists and linguists	9,800	+3,400*
10	Protective services workers	89,600	+3,300*

	Hungary	Employees	Change
1	Agricultural, forestry and fishery labourers	50,300	+22,600
2	Protective services workers	114,300	+15,200
3	Financial and mathematical associate professionals	86,300	+12,200
4	Domestic, hotel and office cleaners and helpers	95,400	+10,000
5	Information and communications technology operations and user support technicians	19,200	+8,100
6	Waiters and bartenders	58,900	+8,000
7	Material-recording and transport clerks	48,300	+7,900
8	Software and applications developers and analysts	28,500	+7,000
9	Client information workers	34,900	+5,300
10	Secondary education teachers	41,700	+5,200

Top 10 growth occupations per country

	Italy	Employees	Change
1	Mining, manufacturing and construction supervisors	149,600	+53,600
2	Material-recording and transport clerks	447,300	+51,200
3	Transport and storage labourers	194,000	+44,700
4	Personal care workers in health services	488,200	+42,200
5	Other health associate professionals	216,100	+34,400
6	Domestic, hotel and office cleaners and helpers	1,048,300	+33,600
7	Other teaching professionals	118,400	+25,200
8	Software and applications developers and analysts	82,400	+24,300
9	Other elementary workers	317,900	+23,700
10	Sales, marketing and public relations professionals	63,500	+21,800

	Luxembourg	Employees	Change
1	Domestic, hotel and office cleaners and helpers	11,000	+2,900
2	Protective services workers	4,600	+2,400
3	Administrative and specialise secretaries	15,200	+1,900
4	Personal care workers in health services	4,500	+1,900
5	Heavy truck and bus drivers	5,800	+1,600
6	Building frame and related trades workers	4,000	+1,600
7	Legal, social and religious associate professionals	4,300	+1,600
8	Legal professionals	4,700	+1,600
9	Mining and construction labourers	2,800	+1,300
10	Primary school and early childhood teachers	8,000	+1,300

Top 10 growth occupations per country

	Malta	Employees	Change
1	Other sales workers	9,100	+8,300
2	Business services and administration managers	4,000	+2,200
3	Business services agents	2,100	+1,600
4	Legislators and senior officials	1,500	+1,100
5	Retail and wholesale trade managers	1,400	+1,100

	Netherlands	Employees	Change
1	Domestic, hotel and office cleaners and helpers	229,400	+24,900
2	Personal care workers in health services	297,600	+19,400
3	Legal, social and religious associate professionals	170,400	+15,100
4	Shop salespersons	435,100	+11,300
5	Other elementary workers	70,900	+10,000
6	Engineering professionals (excluding electrotechnology)	82,900	+9,700
7	Transport and storage labourers	245,000	+8,000
8	Building finishers and related trades workers	57,300	+7,200
9	Medical doctors	46,700	+6,500
10	Building and housekeeping supervisors	35,300	+6,200

Top 10 growth occupations per country

	Poland	Employees	Change
1	Software and applications developers and analysts	100,000	+23,700
2	Car, van and motorcycle drivers	158,900	+22,800
3	Administration professionals	263,000	+22,300
4	Other sales workers	113,700	+18,200
5	Manufacturing, mining, construction, and distribution managers	159,000	+15,800*
6	Sales, marketing and public relations professionals	155,600	+14,000*
7	Building frame and related trades workers	428,800	+13,100*
8	Mining and mineral processing plant operators	124,500	+11,400*
9	Metal processing and finishing plant operators	65,400	+10,600*
10	Legal professionals	80,000	+10,400*

	Portugal	Employees	Change
1	Administrative and specialised secretaries	92,200	+23,000
2	Secondary education teachers	104,600	+13,000
3	Personal care workers in health services	99,400	+10,900
4	Client information workers	82,000	+9,200
5	Social and religious professionals	42,800	+8,200
6	Textile, fur and leather products machine operators	93,300	+7,800
7	Medical and pharmaceutical technicians	20,100	+7,700

Top 10 growth occupations per country

	Romania	Employees	Change
1	Shop salespersons	362,400	+76,800
2	Nursing and midwifery associate professionals	47,200	+31,100
3	Finance professionals	92,200	+25,700
4	Engineering professionals (excluding electrotechnology)	200,500	+23,800
5	Manufacturing labourers	127,200	+23,300
6	Building finishers and related trades workers	97,300	+21,800
7	Building frame and related trades workers	149,900	+21,600
8	Blacksmiths, toolmakers and related trades workers	162,400	+19,800
9	Other sales workers	133,000	+17,900
10	Other personal services workers	33,700	+17,000

	Slovakia	Employees	Change
1	General office clerks	23,500	+18,200
2	Numerical clerks	39,900	+13,300
3	Protective services workers	61,000	+12,400
4	Material-recording and transport clerks	65,500	+10,800
5	Mining, manufacturing and construction supervisors	13,500	+8,900
6	Assemblers	82,000	+7,100
7	Sheet and structural metal workers, moulders and welders, and related workers	34,200	+6,100
8	Other sales workers	10,600	+5,700
9	Building and housekeeping supervisors	24,400	+5,200
10	Animal producers	8,200	+5,000

Top 10 growth occupations per country

	Slovenia	Employees	Change
1	Material-recording and transport clerks	22,200	+5,500
2	Other teaching professionals	8,500	+4,500*
3	Domestic, hotel and office cleaners and helpers	21,300	+3,600*
4	Heavy truck and bus drivers	20,000	+3,500*
5	Sales, marketing and development managers	7,700	+3,300*
6	Manufacturing, mining, construction, and distribution managers	10,100	+2,300*
7	Mobile plant operators	10,400	+2,100*
8	Chemical and photographic products plant and machine operators	3,900	+1,600*
9	Secretaries (general)	23,800	+1,600*
10	Shop salespersons	45,800	+1,400*

	Spain	Employees	Change
1	Administration professionals	172,500	+32,900
2	Other sales workers	80,800	+20,400
3	Food preparation assistants	124,600	+13,400
4	Database and network professionals	44,800	+12,700
5	Agricultural, forestry and fishery labourers	267,100	+11,900
6	Manufacturing, mining, construction, and distribution managers	42,400	+11,100
7	Finance professionals	59,600	+9,300
8	Other teaching professionals	117,400	+9,100
9	Other stationary plant and machine operators	69,700	+8,300
10	Secondary education teachers	267,100	+8,100

Top 10 growth occupations per country

	Sweden	Employees	Change
1	Business services agents	59,300	+9,400
2	Administrative and specialised secretaries	100,400	+9,300
3	Mining, manufacturing and construction supervisors	16,400	+6,600
4	Building and housekeeping supervisors	59,000	+6,600
5	Retail and wholesale trade managers	18,000	+5,400
6	Numerical clerks	65,600	+5,200
7	Building finishers and related trades workers	47,400	+5,000
8	Domestic, hotel and office cleaners and helpers	83,100	+4,600
9	Business services and administration managers	52,700	+4,500
10	Administration professionals	96,900	+4,300

	United Kingdom	Employees	Change
1	Administrative and specialised secretaries	738,100	+146,200
2	Tellers, money collectors and related clerks	323,200	+120,500
3	Client information workers	793,200	+114,600
4	Business services and administration managers	460,400	+90,200
5	Administration professionals	718,900	+79,100
6	Protective services workers	506,600	+71,900
7	Medical and pharmaceutical technicians	134,100	+48,500
8	Other clerical support workers	791,400	+47,800
9	Primary school and early childhood teachers	397,100	+46,100
10	Social and religious professionals	217,500	+39,000

4.2 TOP 5 GROWTH OCCUPATIONS PER COUNTRY – PES INFLOW

Top 5 absolute growth PES inflow (2011Q2-2012Q2), absolute values of 2012Q2, 10 countries, ISCO88, 3-digit

	Austria	Inflow	change
1	Physical and engineering science technicians	3,787	+330
2	Computing professionals	950	+321
3	Other teaching associate professionals	1,150	+303
4	Building frame and related trades workers	2,724	+256
5	Nursing and midwifery associate professionals	1,033	+248

	Belgium	Inflow	change
1	Police inspectors and detectives	1,463	+1,248*
2	Administrative associate professionals	4,447	+553
3	Optical and electronic equipment operators	2,947	+507
4	Machinery mechanics and fitters	5,103	+283
5	Street vendors and related workers	2,016	+146

	Cyprus	Inflow	change
1	Agricultural, fishery and related labourers	1,135	+335
2	Business professionals	93	+34*
3	Fishery workers, hunters and trappers	15	+15*
4	Artistic, entertainment and sports associate professionals	17	+9*
5	Social science and related professionals	33	+8*

	Finland	Inflow	change
1	Library, mail and related clerks	2,205	+1,021
2	Housekeeping and restaurant services workers	9,132	+719
3	Protective services workers	1,382	+422
4	Writers and creative or performing artists	822	+238
5	Garbage collectors and related labourers	229	+196*

	Germany	Inflow	change
1	Personal care and related workers	32,530	+900
2	Customs, tax and related government associate professionals	7,176	+629
3	Administrative associate professionals	6,906	+378
4	Other teaching professionals	2,046	+298
5	Locomotive engine drivers and related workers	673	+218

	Lithuania	Inflow	change
1	Manufacturing labourers	7,476	+2,609
2	Shop salespersons and demonstrators	4,370	+1,457
3	Domestic and related helpers, cleaners and launderers	2,824	+1,219
4	Motor vehicle drivers	4,051	+973
5	Housekeeping and restaurant services workers	3,034	+905

	Portugal	Inflow	change
1	Client information clerks	651	+327
2	Textile, garment and related trades workers	1,195	+120
3	Computer associate professionals	202	+116
4	Crop and animal producers	1,066	+115
5	Rubber- and plastic-products machine operators	189	+108

	Lithuania	Inflow	change
1	Nursing and midwifery associate professionals	2,388	+784
2	Personal care and related workers	10,204	+736
3	Stall and market salespersons	7,155	+725
4	Housekeeping and restaurant services workers	6,393	+623
5	Messengers, porters, doorkeepers and related workers	996	+580

**: the increase is less than +50 or more than +200%, which are indicators that the top growth occupation could be partly determined by incidental recruitment efforts. These occupations are definitely interesting to follow up, but care needs to be taken with regard to their future potential.*

4.3 TOP 5 EURES VACANCIES MAY 2013

1) Finance and sales associate professionals

United Kingdom	31,120 posts
Germany	24,980 posts
France	4,840 posts

2) Architects, engineers and related professionals

United Kingdom	29,170 posts
Germany	17,660 posts
Belgium	2,020 posts

3) Housekeeping and restaurant services workers

Germany	14,700 posts
Austria	9,970 posts
France	7,840 posts

4) Personal care and related workers

Sweden	15,950 posts
Germany	11,970 posts
United Kingdom	11,700 posts

5) Computing professionals

United Kingdom	27,290 posts
Germany	11,300 posts
Belgium	2,500 posts

Based on figures of the EURES Job Mobility portal on 1st May 2013.

ENDNOTES

1 Figures are from Eurostat and represent GDP seasonally adjusted and adjusted for working days (SAWA).

2 The United Kingdom figure probably represents around three times the actual net inflow during the quarter due to the way in which the figures are collected (monthly) and the consequent limits this imposes on their aggregation to quarterly data.

3 CIETT (2013) *The Agency Work Industry around the World* http://www.ciett.org/fileadmin/templates/ciett/docs/Stats/Ciett_EC_Report_2013_Final_web.pdf

4 Based on information from 24 European countries.

5 The number of hours worked is a measure of employment and labour demand and is different to those indicators for job vacancies or hirings,

6 From VISA Europe: EU Consumer Spending Barometer. This monitors expenditure in VISA debit and credit cards which together account for around 14 per cent of all consumer transactions in the EU27. Available at: http://www.visaeurope.com/en/newsroom/all_reports/latest.aspx

7 While PES data on the UK are available, the figure probably represents around three times the actual net inflow during the quarter due to the way in which the figures are collected (monthly) and the consequent limits this imposes on their aggregation to quarterly data.

8 Figures for 2011 from: European Commission (2013) *Employment and Social Developments in Europe 2012*. Available at: http://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=7315

9 Again the UK data has been excluded due to the problems already set out (see note 7)

10 Eurydice (2012) *Key data on education in Europe 2012*. Available at: http://eacea.ec.europa.eu/education/Eurydice/documents/key_data_series/134EN.pdf

ANNEX A1 REFERENCES

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ANNEX A2 ABBREVIATIONS

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
EVRR	European Vacancy and Recruitment Report
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
TWA	Temporary Work Agency

ANNEX A3 DEFINITIONS AND CONCEPTS

Educational field (LFS, Eurostat)

Data on job hirings by educational field are provided by Eurostat based on the Labour Force Survey (LFS). Contrary to data by educational level, data by educational field are not available on a quarterly base, but on an annual base only. Also, data by educational field are only available for those with medium or upper educational levels: formal “upper secondary education” or higher. The classification of educational field is based on an 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 (National accounts, Eurostat)

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

Job vacancies (JVS, Eurostat)

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.

A vacant post that is only open to internal candidates is not treated as a ‘job vacancy’.”
The stock of job vacancies is the number of job vacancies measured at a certain point in time.

Job hirings (LFS, Eurostat)

Job hirings refer to employees who were employed in a ‘reference week’ of that quarter and have started working for their employer job in the month, or, at most, three months earlier than the month of the ‘reference week’. The calculation of job hirings is based on the tenure variable in the quarterly Eurostat Labour Force Survey. Job hirings exclude the self-employed since a job vacancy is defined as a vacant post for an employee (see definition above). The number of job hirings is used as a reliable proxy indicator of the number of hirings and has the following strength:
Job hiring data are flow data that cover all who found a job over a three-months period, while the Eurostat job vacancy data (JVS) only covers the number of vacancies available at a point of time. As a result job hiring data tend to be significantly higher. Besides, job hiring data are available for all EU27 countries.

Newly registered job vacancies (national PES)

The number of newly registered job vacancies (the inflow) is the sum of new job vacancies registered by the PES in a certain period of time and it is a flow figure rather than a point in time estimate (stock). Inflow is used because for the PES, comparisons of stocks would suffer from differences in national policies for closing registered vacancies. For example, the stock will be higher if vacancies are closed after six months compared to one month. The inflow of registered job vacancies depends not only on the demand for labour, but also on the extent to which employers involve the PES in filling job vacancies.

Stock, inflow and outflow (concepts)

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. If the stock and flow move in opposite directions, this usually indicates a change in the duration. For example if the stock of job vacancies increases and the number of job hirings decreases, this indicates that it takes longer on average to fill vacancies, other things being equal.

Unemployed to job hirings ratio (LFS, Eurostat)

The relationship between the total number of unemployed and the total number of job hirings is used as an indicator of the degree of ‘tightness’ of the labour market. In this case the number of job hirings is used as a proxy for the number of filled vacancies. A relation of the stock or the inflow of job vacancies to unemployment would be theoretically preferable, as this ratio would also include vacancies that are not filled. However, no data on the inflow is available at all, and data on the number of job vacancies is not available for all EU27 countries.

Methodological notes on the job vacancy statistics (JVS) of 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 five countries: Denmark, France, Greece, Italy, Poland. In Denmark and Italy and data for the public sector including education and healthcare are not collected at all. Portugal collects data on public administration vacancies since 2012Q1, so for public administration in Portugal no historical comparison is yet possible. Because no total numbers of vacancies are published at all for France, Italy and Poland, these three countries are excluded.

To represent vacancy developments as fully as possible, Chart 1 presents all available data inclusive the whole public sector (NACE O to S) where possible, exclusive the whole public sector for Denmark and exclusive public administration only for Portugal (and Greece). 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 any analysis of JVS data preceding 2010Q1.

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 this reason, these three countries are left out of the analysis.

But the most important note is that differences between countries may originate from differences in sampling units (corporate versus local) or sources used (administrative versus survey).

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