



EXCELSIOR INFORMA

Year 2023

COMPANY EMPLOYMENT SCHEMES OBTAINED FROM THE CHAMBER OF COMMERCE SYSTEM

SUMMARY

<i>Hiring expected in 2023: company areas and business sectors</i>	pag. 2
<i>Main characteristics of expected revenue by business sector</i>	pag. 3
<i>Main characteristics of expected income by profession</i>	pag. 4
<i>Main characteristics of expected earnings by age group</i>	pag. 9
<i>The fields of study that offer the greatest job opportunities</i>	pag. 10
<i>Skills required according to the qualification</i>	pag. 11
<i>Companies hiring</i>	pag. 12
<i>Recruitment channels used by companies</i>	pag. 12
<i>Companies investing in digital transformation</i>	pag. 13
<i>Formazione continua e raccordo scuola-lavoro</i>	pag. 14
<i>Inflow in the various regions</i>	pag. 15

In 2023, the positive trend in job demand planned by companies continues, albeit with a slower growth rate than that recorded in the previous two years. The number of companies that have planned to hire goes from around 785 thousand in 2022 to the current 823 thousand (+4.9%); more marked, equal to +6.4%, is the increase in the number of workers who will join the company workforce, which this year reaches 5.5 million units (compared to 5.2 in the previous year). September 2022) and, at the same time, a reduction in the unemployment rate (-0.6 points).

However, the growth in demand for work is accompanied by greater difficulty for companies in finding the desired profiles, which in 2023 will affect 45% of planned revenues. The problems of companies in finding staff reflect the intertwining of various factors and very heterogeneous situations in the area. The 2023 data compared with the previous year above all highlights the increase in the mismatch linked to the lack of specific professional profiles available for inclusion in the company, which goes from 24.6% in 2022 to 28.4% in 2023; the share of the qualitative mismatch, i.e. the inadequacy of the skills possessed by the candidates compared to those expected by the companies, is confirmed as 12.4% of the total planned revenue.



COMPANIES HIRING



OUT OF ALL COMPANIES WITH EMPLOYEES



EXPECTED INFLOW



YOUNG PEOPLE



DIFFICULTY IN RECRUITING

2023 823,100

62%

5,509,130

30%

45%

2022 784,560

60%

5,179,140

29%

41%

N.B. Due to the rounding off, the sum of the single percentage values may differ by 100. This note applies to all graphs in the bulletin showing percentage compositions.

INFLOW EXPECTED IN 2023: BUSINESS AREAS AND BUSINESS SECTORS

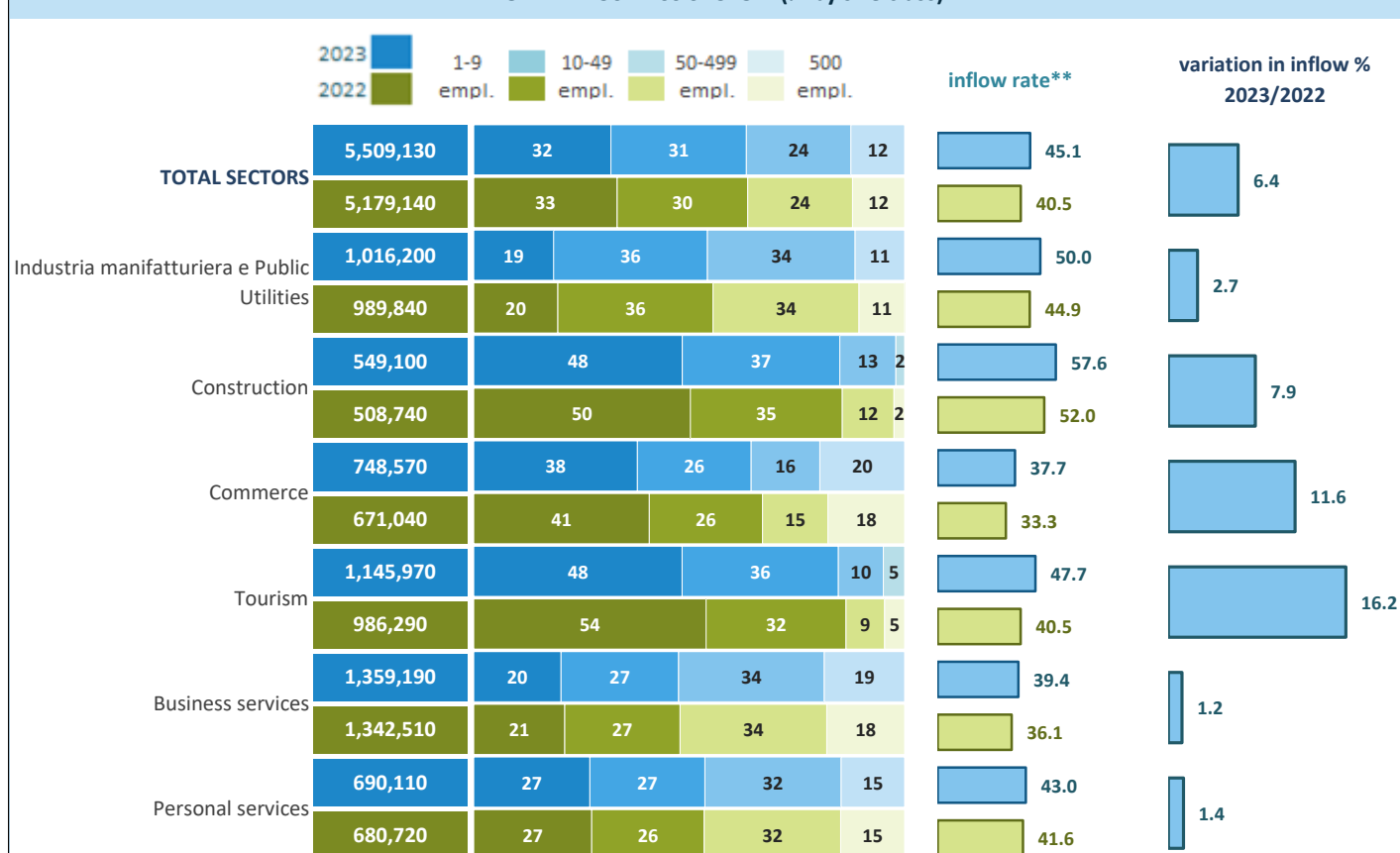
The company area of production or, in the case of tertiary companies, service provision traditionally absorbs almost half of the new contracts activated every year.

In 2023, planned revenues in this area will reach 2.6 million units, with an increase of approximately 185 thousand units compared to 2022, to which revenue growth in the construction and tourism sectors mainly contributes. A significant increase (+114 thousand entries) is also recorded in the commercial and sales areas as a whole, which, above all by virtue of the contracts activated by companies operating in the trade, concentrate a significant share of the revenues scheduled each year (17- 18%).

With reference to the other company areas, which are characterized by numerically smaller revenues, high procurement difficulties emerge for the typical profiles of design/research (which concern 59% of the planned revenues in this area), installation and maintenance (61%) and in particular information systems (66%).

BUSINESS AREAS	2023			2022		
	INFLOW (*)	% inflow	% diff. rec.	INFLOW (*)	% inflow	% diff. rec.
TOTALE	5,509,130	100.0	45	5,179,140	100.0	41
Direction and General services areas	239,500	4.3	46	239,630	4.6	43
1 General management and human reso	30,300	0.5	41	28,550	0.6	35
2 Secretariat, staff and general services	105,830	1.9	28	95,540	1.8	25
3 Information systems	103,370	1.9	66	115,540	2.2	61
Administrative areas	270,780	4.9	37	259,770	5.0	36
1 Administration, legal	99,450	1.8	39	106,470	2.1	40
2 Accounting, management control, finance	171,330	3.1	36	153,300	3.0	33
Technical and planning areas	715,070	13.0	56	688,630	13.3	53
1 Planning and research and	155,270	2.8	59	165,950	3.2	56
2 Installation and maintenance	460,760	8.4	61	430,350	8.3	56
3 Certification, quality control, safety, environment	99,040	1.8	32	92,340	1.8	30
Production of goods and provision of services area	2,624,370	47.6	47	2,439,470	47.1	42
Commercial and sales areas	1,000,020	18.2	36	885,700	17.1	32
1 Vendita	625,040	11.3	36	565,080	10.9	34
2 Marketing, commercial, communication, public relations	135,760	2.5	45	120,150	2.3	40
3 Customer assistance	239,220	4.3	30	200,470	3.9	24
Logistics areas	659,390	12.0	41	665,940	12.9	35
1 Purchasing and internal handling of	178,040	3.2	33	173,790	3.4	26
2 Transportation and distribution	481,350	8.7	44	492,140	9.5	38

INFLOW BY BUSINESS SECTOR (% by size class)*



* Activation of contracts for employees and non-employees (with a duration > 20 days) planned by companies with employees.

MAIN CHARACTERISTICS OF EXPECTED INFLOW BY BUSINESS SECTOR



DIFFICULTY IN RECRUITING **45%**
for lack of candidates **28%**
due to inadequate skill set **12%**
for other reasons **4%**



EXPERIENCE **65%**
in the profession **22%**
in the sector **43%**
non requested **35%**

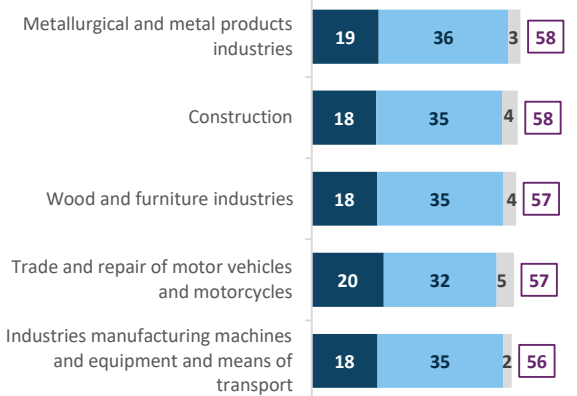


GENDER
female **18%**
male **32%**
equally suitable **50%**

The mismatches between job supply and demand do not affect all economic sectors in the same way but are more accentuated in some sectors than others. In 2023, in the metal and metal products and construction industries, 58% of planned revenue is difficult to come by, compared to an average of 45%. Similar percentages (56-57%) are recorded in the wood and furniture industries, in the trade and repair of motor vehicles and motorcycles and in the manufacturing of machinery, equipment and means of transport. A high level of specific experience (in the sector or in the profession to be carried out in the company) is instead necessary above all in service activities, in particular in media and communication, where 85% of revenue is involved, and in private healthcare and social assistance (84%). Furthermore, in the latter sector, approximately a quarter of revenue involves immigrant workers. The use of immigrant personnel is even more frequent (expected to account for around a third of revenue) in the operational services and transport/logistics/warehousing sectors; however, in absolute terms, it is the tourism and restaurant sector that concentrates the greatest number of these workers' income, with 207 thousand units in 2023.

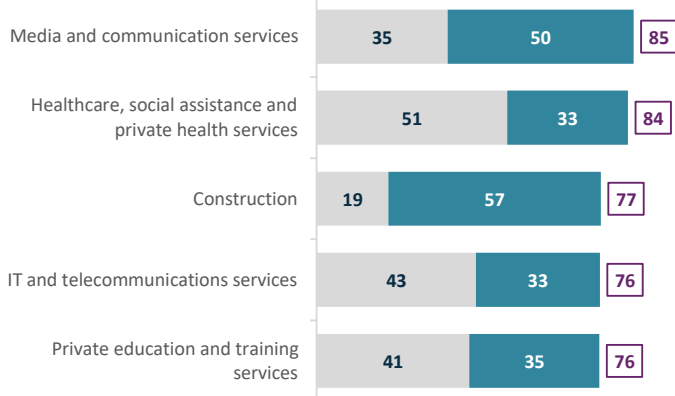
THE MAIN SECTORS...

...WITH THE GREATEST DIFFICULTY IN RECRUITING (%)



■ Inadequate skill set ■ Lack of candidates ■ Other reasons

...IN WHICH SPECIFIC EXPERIENCE IS MOST OFTEN REQUIRED (%)



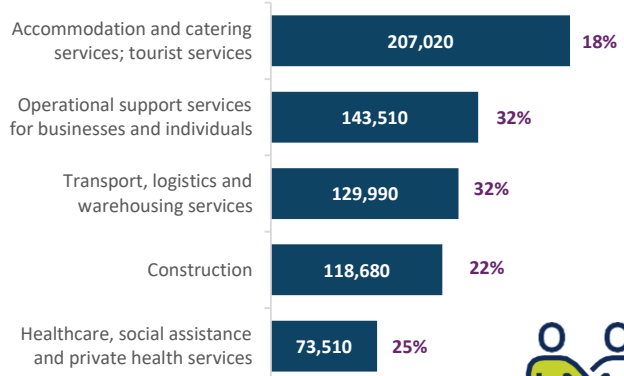
■ Experience in the profession ■ Experience in the sector

...IN WHICH STAFF IS SOUGHT BY GENDER (%)



■ female ■ male ■ equally suitable

... WITH GREATER INFLOW OF IMMIGRANT PERSONNEL (a.v. and % of total inflow in the sector)



Total inflow of immigrant personnel **1,057,620** **19%**



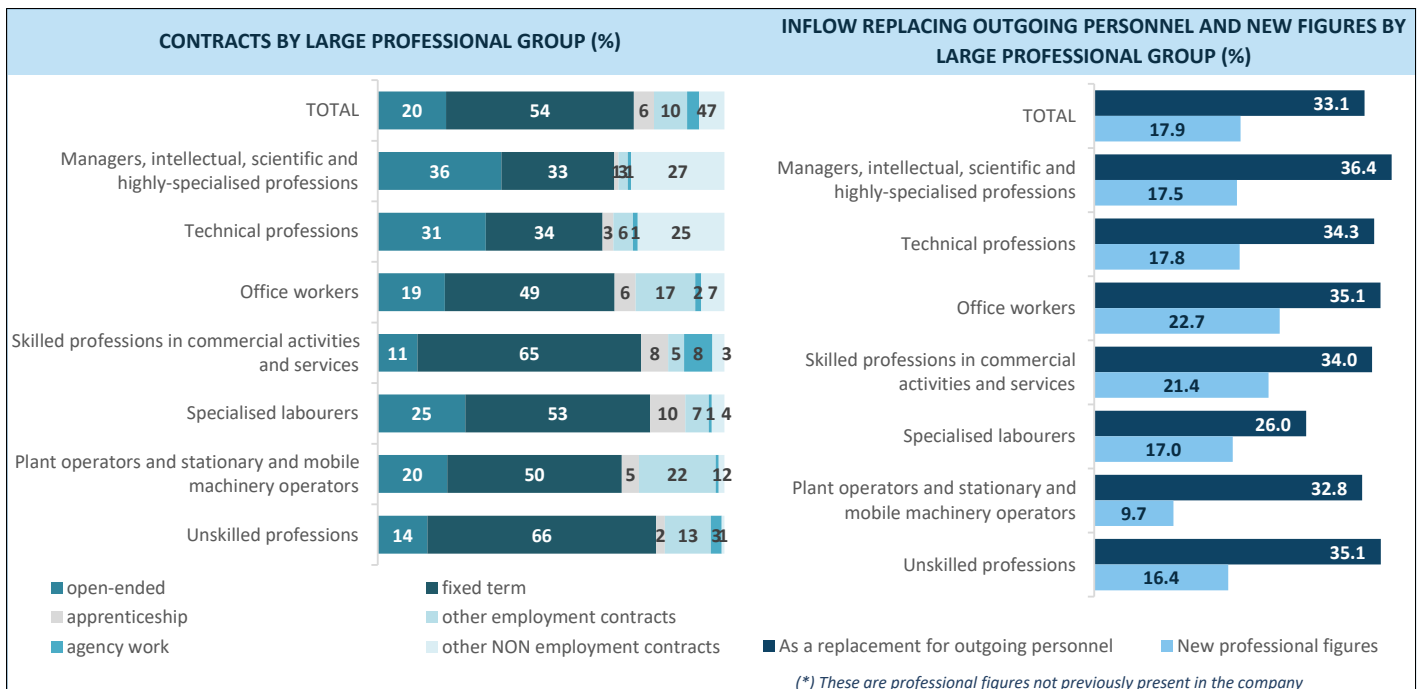
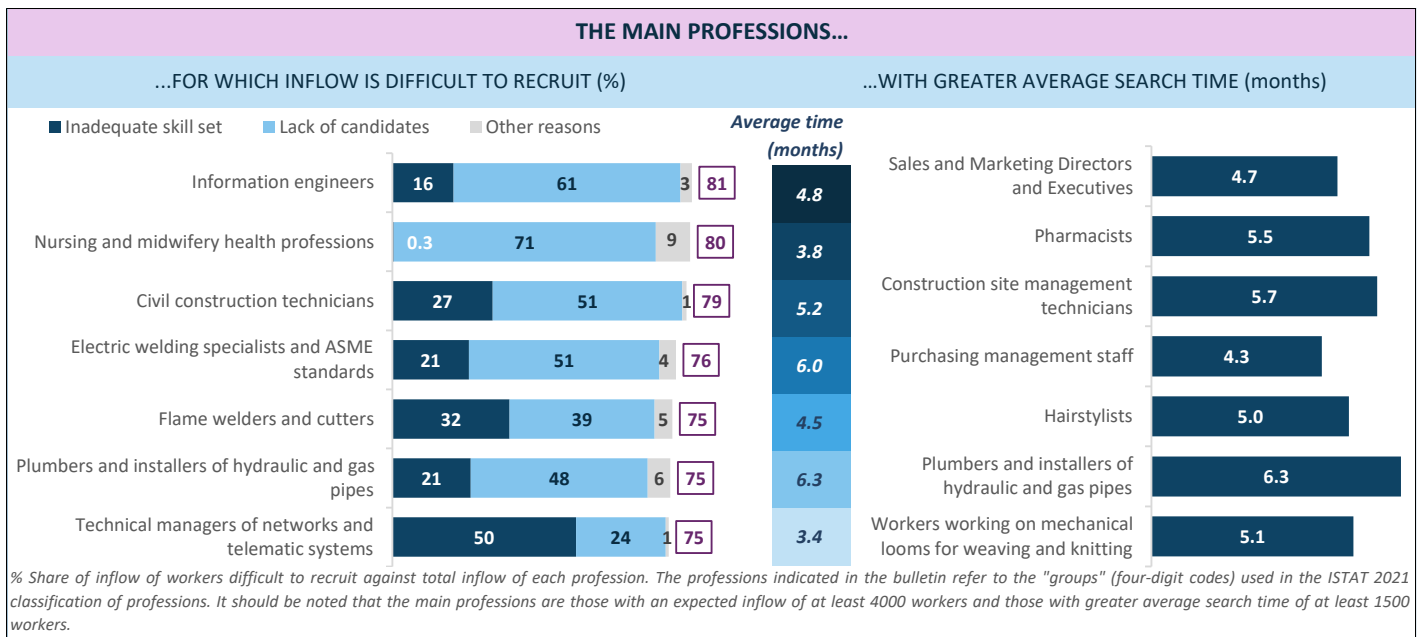
% share of difficult to recruit/experienced/gender-specific new hires out of each sector's total inflow. The sectors are presented in descending order with respect to the variable indicated in the graph.

MAIN CHARACTERISTICS OF EXPECTED INFLOW BY PROFESSION

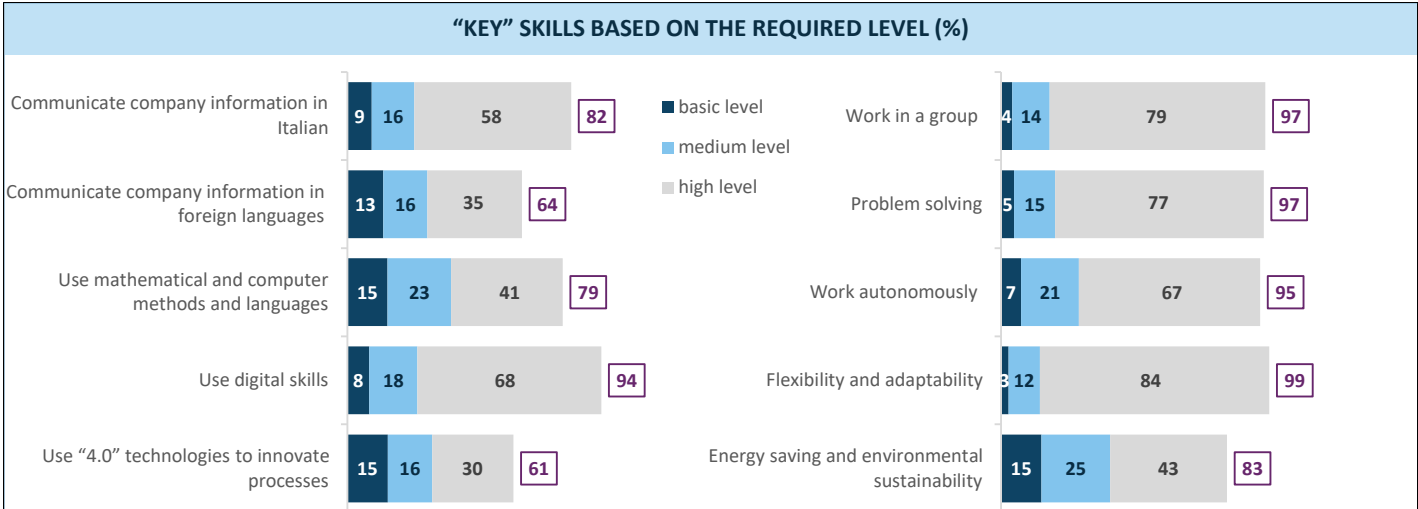
TOTAL INFLOW AND RELATIVE DIFFICULTY IN RECRUITING AND AVERAGE SEARCH TIME		diff. rec. %	Average time (month)
Artisans, specialised labourers and agriculturalists	835,580	60.3	4.8
Technical professions	678,600	52.3	3.8
Plant operators and machinery operators	662,130	49.6	3.4
Managers and intellectual, scientific and highly-specialised professions	347,270	48.6	3.5
Skilled professions in commercial activities and in services	1,600,770	43.6	2.9
Executive professions in office work	490,730	31.2	3.3
Unskilled professions	894,060	31.0	2.4
Total inflow	5,509,130	45.1	3.3

The biggest problems for companies in finding workers concern specialized workers: in 2023, finding difficulties are expected for 60.3% of the planned revenue of these profiles, difficulties which determine particularly long search times for companies, around 5 months. Higher-than-average recruitment difficulties also affect workers with a lower level of specialization, typically plant and machinery operators (49.6%), as well as technical profiles (52.5%) and managerial or highly specialized profiles (49.6%). %; the average search times are between 3.4 and 3.8 months.

Going into the detail of the individual professions, however, it emerges that in several cases the search times by companies exceed 5 months and in particular for workers specialized in the plumbing sector they exceed 6 months.



Among the technological skills required of the highest profile professional figures, digital ones stand out, considered necessary for 94% of income, while both the use of IT languages and methods (74%) and the application of "4.0" technologies are less requested. and artificial intelligence for process innovation (61%); despite reaching the highest levels among all professional macro-groups. With particular reference to technical profiles closely linked to IT (programmers and application experts), companies are strongly oriented towards younger people (up to 29 years old) but, at the same time, have considerable difficulty in finding suitable candidates, reporting time of research exceeding 4 months.



MAIN CHARACTERISTICS OF THE PROFESSIONS MOST IN DEMAND (%)

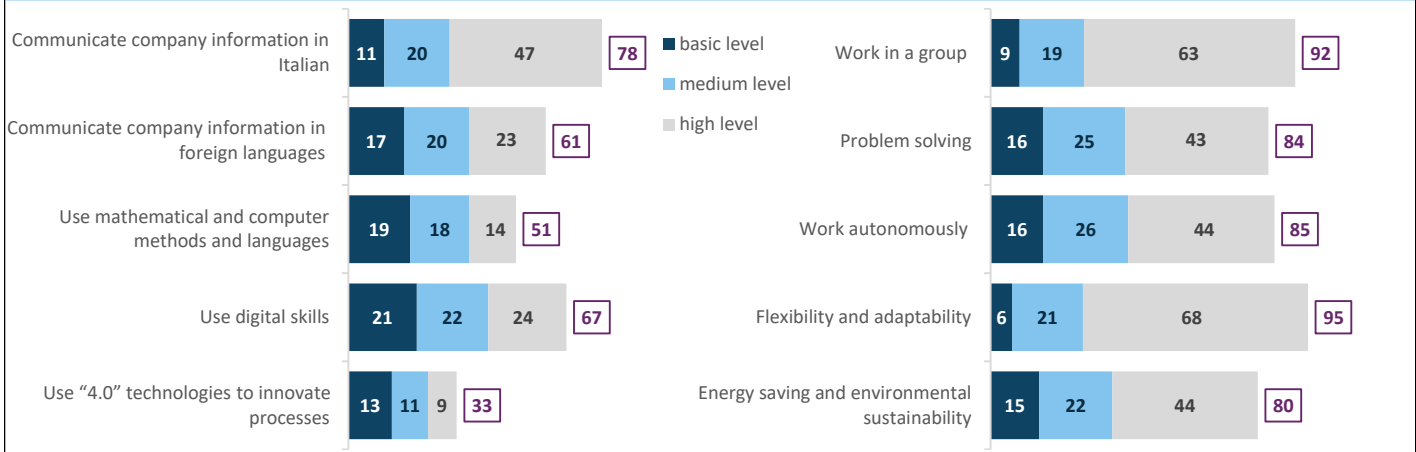
Code - Profession	INFLOW (A.V.)	young people under 30 (%)	with experience (%)	female gender (%)	new figures (%)	Average time (months)
3334-Sales and distribution technicians	100,380	19.6	75.8	15.5	19.2	3.9
3212-Rehabilitative health professions	65,850	29.2	92.2	22.9	7.6	2.7
3312-Accountants	54,940	22.6	79.8	28.6	19.9	3.7
3211-Nursing and midwifery health professions	42,010	19.3	90.0	7.6	2.9	3.8
3121-Programmer technicians	35,280	49.5	83.5	-	9.9	4.4
2711-Software analysts and designers	29,310	23.4	90.6	1.0	12.4	4.0
3122-Technicians expert in applications	29,270	52.9	71.3	6.6	16.2	4.2
3422-Teachers in professional training	28,280	6.1	91.7	8.3	17.6	2.1
3152-Technicians for the management of construction sites	25,920	11.2	95.3	1.2	28.2	5.7
2217-Industrial and management engineers	25,030	13.3	94.1	8.6	29.6	4.2
1233-Directors and managers of sales and marketing	1,860	-	97.8	-	29.8	4.7
1314-Entrepreneurs and managers of small businesses in the trade	1,820	-	99.7	-	-	3.0

THE MOST DIFFICULT PROFESSIONS TO RECRUIT BY MAIN REASONS (%)

Code - Profession	INFLOW (A.V.)	of which DIFFICULT TO RECRUIT	Inadequate skill set (%)	Lack of candidates (%)	Other reasons (%)	average search time (months)	
3334-Sales and distribution technicians	100,380	50,300	20	26	4	50	3.9
3211-Nursing and midwifery health professions	42,010	33,740	0	71	9	80	3.8
3212-Rehabilitative health professions	65,850	30,900	8	35	4	47	2.7
3121-Programmer technicians	35,280	23,220	15	47	4	66	4.4
3312-Accountants	54,940	21,300	14	22	4	39	3.7
2711-Software analysts and designers	29,310	19,350	10	51	4	66	4.0
3122-Technicians expert in applications	29,270	18,790	27	33	4	64	4.2

For intermediate level profiles, the skills considered most important by companies are flexibility and the ability to work in a team, required for over 90% of revenue. Furthermore, for several professions in this group, with high frequency (for over 40% of revenue) companies lean towards candidates under 30 years of age. Regardless of the age and skills required, companies need quite a long time to find some professional figures, in particular hairdressers, for whom the search lasts on average 5 months, cooks (3.8 months), general affairs (3.7 months) and customer reception and information staff (3.4 months).

"KEY" SKILLS BASED ON THE REQUIRED LEVEL (%)



MAIN CHARACTERISTICS OF THE PROFESSIONS MOST IN DEMAND (%)

Code - Profession	INFLOW (A.V.)	young people under 30	with experience	female gender	new figures	Average time (months)
5223-Waiters	427,650	47.3	68.1	17.8	25.8	3.0
5122-Retail sales clerks	408,370	49.7	53.9	33.4	13.5	2.4
5221-Cooks in hotels and restaurants	237,240	26.5	82.5	8.5	32.9	3.8
5224-Bartenders	164,040	54.2	57.2	36.1	28.3	3.0
4112-General affairs workers	156,430	23.6	66.2	35.1	23.6	3.7
5311-Qualified professions in health and social services	77,340	12.4	83.7	30.1	2.6	2.4
4221-Reception and information workers in businesses and public bodies	70,680	51.0	34.8	28.4	26.3	3.4
5222-Employees preparing, cooking and distributing food	65,660	42.7	47.8	24.0	10.2	1.8
4111-Employees performing secretarial functions	59,600	31.2	49.9	61.3	26.6	3.3
4222-Reception workers in accommodation and catering services	45,820	27.0	83.0	28.1	26.5	2.9
5511-Hairdressers	44,230	66.1	58.8	32.9	27.2	5.0
5523-Personal assistance workers	35,900	16.7	86.2	44.1	3.8	2.0

THE MOST DIFFICULT PROFESSIONS TO RECRUIT BY MAIN REASONS (%)

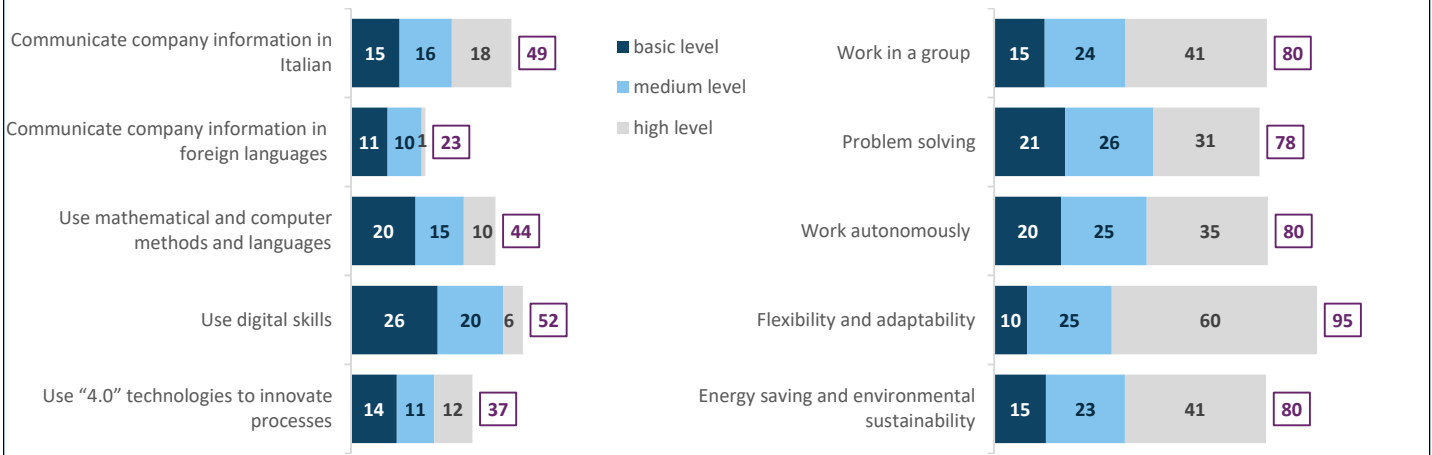
Code - Profession	INFLOW (A.V.)	of which DIFFICULT TO RECRUIT	average search time (months)
5223-Waiters	427,650	220,290 (11% Inadequate skill set, 35% Lack of candidates, 5% Other reasons)	3.0
5221-Cooks in hotels and restaurants	237,240	132,900 (12% Inadequate skill set, 39% Lack of candidates, 5% Other reasons)	3.8
5122-Retail sales clerks	408,370	115,130 (9% Inadequate skill set, 16% Lack of candidates, 4% Other reasons)	2.4
5224-Bartenders	164,040	71,620 (11% Inadequate skill set, 27% Lack of candidates, 6% Other reasons)	3.0
4112-General affairs workers	156,430	53,140 (21% Inadequate skill set, 12% Lack of candidates, 1% Other reasons)	3.7
5311-Qualified professions in health and social services	77,340	43,010 (9% Inadequate skill set, 44% Lack of candidates, 3% Other reasons)	2.4
5222-Employees preparing, cooking and distributing food	65,660	28,030 (7% Inadequate skill set, 25% Lack of candidates, 10% Other reasons)	1.8

SPECIALISED LABOURERS, PLANT AND MACHINE OPERATORS

1,497,710
inflow

Flexibility is a requirement of the utmost importance not only for intermediate profiles, but also for blue-collar profiles, to whom this skill is required in 95% of cases. In general, companies report considerable difficulties in finding these professional figures, difficulties which in several cases concern two thirds (or more) of the planned revenue and lead to long search times, often exceeding 4 months. The main obstacle to finding worker profiles comes from quantitative mismatches between job supply and demand, which are more widespread in the industrial sector than in the tertiary sector.

"KEY" SKILLS BASED ON THE REQUIRED LEVEL (%)



MAIN CHARACTERISTICS OF THE PROFESSIONS MOST IN DEMAND (%)

Code - Profession	INFLOW (A.V.)	young people under 30	with experience	female gender	new figures	Average time (months)
7423-Drivers of heavy vehicles and trucks	241,330	9.9	79.3	-	11.7	3.5
6121-Stone, brick, refractory masons	206,490	17.8	83.0	-	25.7	4.5
6137-Electricians in civil construction	96,930	43.8	69.8	-	17.8	5.9
6233-Mechanics and assemblers of industrial machinery	58,870	31.1	72.5	-	10.3	4.7
7211-Workers assigned to industrial automatic and semi-automatic machine tools	49,900	47.7	56.0	2.9	7.3	4.7
6223-Machine tool fitters	45,700	41.1	62.9	2.0	8.2	4.8
7281-Workers employed on industrial product packaging machines	45,360	23.2	24.9	27.2	7.0	2.2
7444-Forklift drivers	43,700	30.7	51.4	-	5.4	2.9
6241-Installers and repairers of electrical and electromechanical equipment	43,190	37.8	70.6	-	10.4	5.0
6214-Metal carpentry assemblers	40,210	24.1	75.8	-	11.8	5.0
6231-Artisanal mechanics, car repairers and maintainers	36,330	48.1	69.8	-	15.4	6.1
6136-Plumbers and installers of hydraulic and gas pipes	34,830	39.2	69.9	-	13.0	6.3

THE MOST DIFFICULT PROFESSIONS TO RECRUIT BY MAIN REASONS (%)

Code - Profession	INFLOW	of which DIFFICULT TO RECRUIT	Inadequate skill set	Lack of candidates	Other reasons	average search time (months)
7423-Drivers of heavy vehicles and trucks	241,330	136,990	11	42	3	57
6121-Stone, brick, refractory masons	206,490	109,700	18	31	4	53
6137-Electricians in civil construction	96,930	65,870	21	40	7	68
6233-Mechanics and assemblers of industrial machinery	58,870	38,850	21	41	5	66
7211-Workers assigned to industrial automatic and semi-automatic machine tools	49,900	33,110	15	47	5	66
6223-Machine tool fitters	45,700	31,740	23	43	4	69
6241-Installers and repairers of electrical and electromechanical equipment	43,190	28,020	22	41	3	65

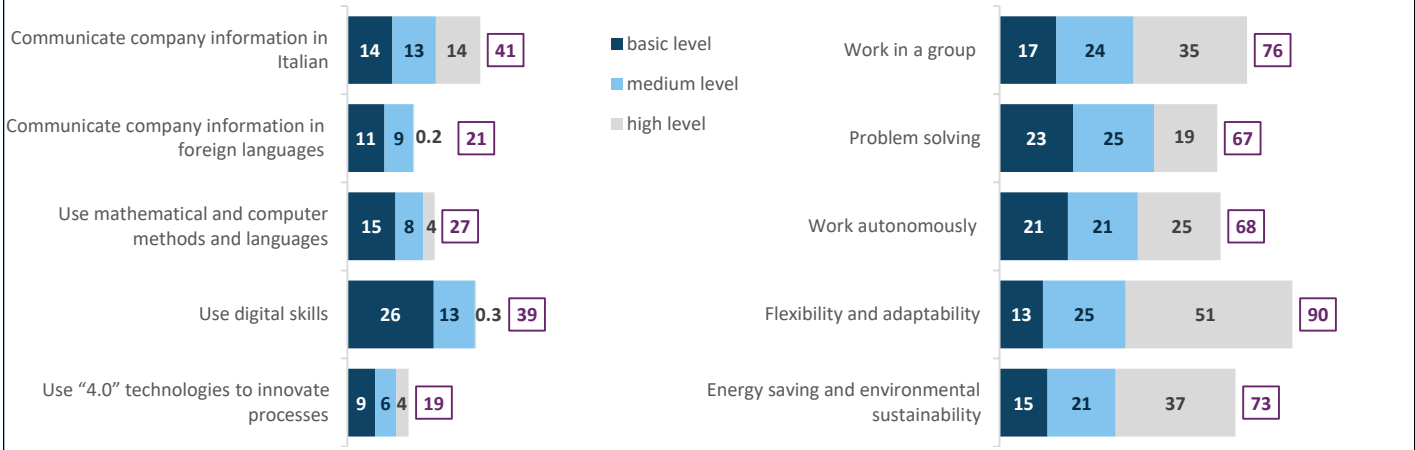
UNSKILLED PROFESSIONS

894,060

inflow

For professions classified as unskilled, flexibility is required for 90% of income, a percentage which, although lower than that recorded for other profiles, is decidedly high. Unlike what happens for specialized workers and plant operators, for these professional figures companies do not require particularly high levels of previous experience and do not have particular difficulties in the recruitment phase; consequently search times are generally shorter. Among the most requested professional figures, the only exception is green maintenance workers, for whom greater recruitment difficulties are expected, partly attributable to the greater specific experience required.

"KEY" SKILLS BASED ON THE REQUIRED LEVEL (%)



MAIN CHARACTERISTICS OF THE PROFESSIONS MOST IN DEMAND (%)

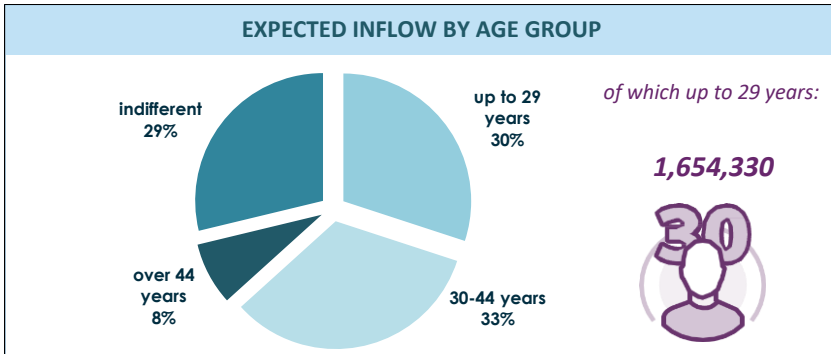
Code - Profession	INFLOW (A.V.)	young people under 30	with experience	female gender	new figures	Average time (months)
8143-Unqualified personnel. office/commercial cleaning services worker	379,130	7.1	48.1	34.3	13.9	2.3
8132-Unqualified personnel responsible for packaging and warehouse	209,410	33.1	34.8	3.4	12.8	2.4
8141-Unqualified personnel responsible for cleaning accommodation and ship services	53,020	7.7	51.4	65.0	32.4	2.3
8142-Unqualified staff in catering services	41,870	14.2	30.9	21.1	33.0	2.4
8431-Unqualified personnel of industrial activities	38,330	25.5	31.9	12.4	24.2	2.7
8161-Unqualified personnel. building/equipment/assets custodian services officer	37,340	13.7	38.3	4.7	20.0	2.0
8133-Delivery workers	28,000	36.1	33.4	1.6	12.4	2.4
8131-Porters, responsible for moving goods	26,620	28.3	32.8	1.6	14.3	2.5
8145-Ecological operators and other waste collectors and separators	21,660	15.9	33.8	2.0	3.2	2.1
8312-Unqualified personnel responsible for green maintenance	18,110	18.3	65.6	-	10.2	3.2
8421-Labourers and unqualified personnel in civil construction	15,680	33.4	37.8	-	28.2	2.9
8211-Unqualified staff in recreational and cultural services	10,780	32.3	40.8	4.3	37.1	2.6

THE MOST DIFFICULT PROFESSIONS TO RECRUIT BY MAIN REASONS (%)

Code - Profession	INFLOW	of which DIFFICULT TO RECRUIT	Preparazione inadeguata	Mancanza di candidati	Altri motivi	average search time (months)	
8143-Unqualified personnel. office/commercial cleaning services worker	379,130	130,110	5	22	8	34	2.3
8132-Unqualified personnel responsible for packaging and warehouse	209,410	57,900	7	18	3	28	2.4
8141-Unqualified personnel responsible for cleaning accommodation and ship services	53,020	18,690	6	26	3	35	2.3
8142-Unqualified staff in catering services	41,870	12,700	3	22	5	30	2.4
8431-Unqualified personnel of industrial activities	38,330	10,590	8	18	2	28	2.7
8161-Unqualified personnel. building/equipment/assets custodian services officer	37,340	8,050	5	13	3	22	2.0
8312-Unqualified personnel responsible for green maintenance	18,110	7,830	10	25	9	43	3.2

MAIN CHARACTERISTICS OF EXPECTED INFLOW BY AGE GROUP

Considering all the professional figures, for around a third of the revenue planned for 2023, companies would prefer people aged between 30 and 44. Slightly lower are the shares of revenue aimed at younger candidates (30% of total revenue) and those for which age is considered indifferent (29%). Much more modest, however, is the incidence of income for which companies prefer candidates over 44 years of age, equal to only 8%. The sectors most oriented towards younger people (up to 29 years of age) are retail trade, with 45% of revenues aimed at the youth component, and IT and telecommunications services (43%).



The difficulty in finding young people concerns 45% of the planned income, a percentage in line with the average. However, more frequent problems are reported (for over 60% of revenue) for various professional figures, in particular workers specialized in the electrical sector, mechanics and activities related to plumbing, nurses, IT technicians and pharmacists.

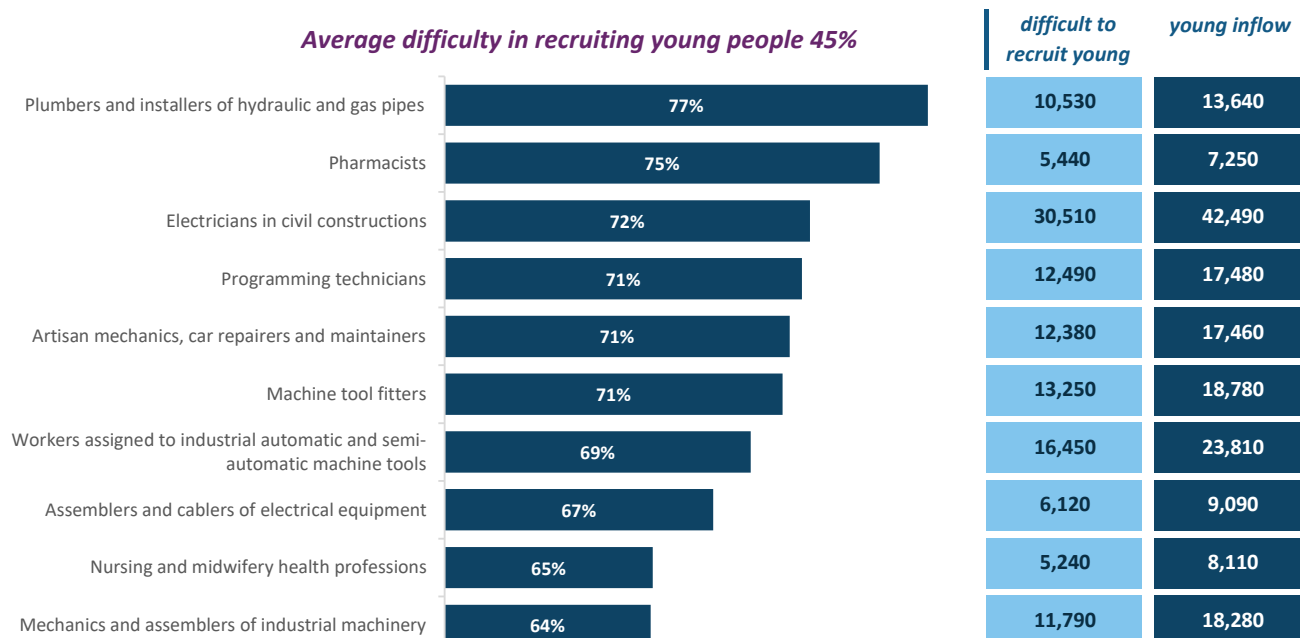
MAIN BUSINESS SECTORS LOOKING FOR YOUNG PEOPLE (% of young people out of the total for the sector)



The top 10 sectors in terms of young inflow up to 29 years of age (by absolute value) were selected

PROFESSIONS WITH THE GREATEST DIFFICULTY IN RECRUITING YOUNG PEOPLE (expected inflow of young people - % share and a.v.)

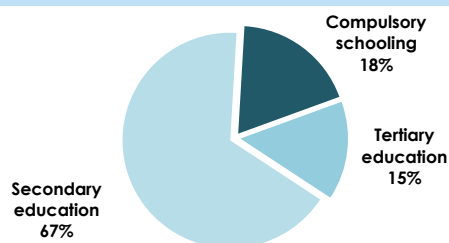
Average difficulty in recruiting young people 45%



FIELDS OF STUDY THAT OFFER THE GREATEST JOB OPPORTUNITIES

In 2023, possession of a tertiary education level (degree or ITS Academy diploma) is required for 15% of candidates, a secondary education diploma is the preferred level of education for two thirds of income while for only 18% of the new contracts, companies consider compulsory schooling alone to be sufficient. The requirement of previous experience tends to increase as the level of education increases, highlighting that, especially for specialized profiles, formal education alone is often not sufficient to carry out the activities required within the profession to be practiced. As regards recruitment problems, the most relevant ones concern graduates of the ITS Academy courses, with a share equal to 66% of revenue. However, the percentage reaches 74% in the case of graduates of courses relating to the mechanics area and 69% in those of the ICT area, which are the two most requested ITS courses. Among the degrees, the most requested are those with an economic focus, followed at a distance by those with a teaching and training focus and those with a healthcare and paramedical focus, the latter being particularly difficult to find. Among upper secondary school diplomas, businesses especially require administrative and tourism-hotel specializations; among those qualified, those related to catering, mechanics and logistics prevail.

EXPECTED INFLOW BY EDUCATION LEVEL



	Expected inflow (a.v.)	% difficult to recruit	% with experience
TERTIARY EDUCATION	815,430	49%	88%
SECONDARY EDUCATION	3,673,920	45%	64%
COMPULSORY SCHOOLING	1,019,770	41%	54%

TERTIARY EDUCATION

	Expected inflow (a.v.)	% su tertiary education	% difficult to recruit	% with experience
UNIVERSITY	768,020	94%	49%	88%
HIGHER TECHNICAL EDUCATION (HTE)	47,410	6%	66%	77%

FIELDS OF STUDY MOST HIGHLY REQUESTED

Field of Study	Expected inflow (a.v.)	% difficult to recruit	% with experience
Economic address	222,730	39%	79%
Teaching and training address	116,990	40%	93%
Health and paramedical address	61,870	67%	92%
New technologies for made in Italy - mechanics	16,630	74%	75%
Information and communication technologies	13,020	69%	82%

Legend: ■ Università, ■ ITS Academy

SECONDARY EDUCATION

	Expected inflow (a.v.)	% su secondary education	% difficult to recruit	% with experience
TECHNICAL-PROFESSIONAL HIGH SECONDARY SCHOOL DIPLOMA	1,459,650	40%	45%	68%
HIGH SECONDARY SCHOOL DIPLOMA*	136,450	4%	27%	70%
TRAINING QUALIFICATION OR PROFESSIONAL DIPLOMA (IeFP)	2,077,830	57%	47%	60%

* Classical, scientific, human sciences, linguistics, artistic high school

FIELDS OF STUDY MOST HIGHLY REQUESTED

Field of Study	Expected inflow (a.v.)	% difficult to recruit	% with experience
Specialisation administration, finance and marketing	481,370	30%	60%
Catering Specialisation	448,380	50%	67%
Specialisation tourism, food and wine and hospitality	279,050	51%	76%
Mechanical Specialisation	268,650	58%	59%
Specialisation logistics systems and services	227,850	36%	51%

Legend: ■ Training qualification, ■ IeFP

SKILLS REQUIRED BASED ON QUALIFICATION

When they indicate the skills they require from candidates, companies also indicate the degree of importance attributed to them, which in the case of technological and transversal skills varies significantly depending on the level of education and the training course requested. For example, digital skills are considered important for 69% of candidates with a tertiary education but it reaches 77% in the case of economics-oriented degrees and 93% in the case of ICT-oriented training. The latter course naturally shows the highest importance also with reference to skills relating to 4.0 and artificial intelligence technologies and applications (65%) and the use of mathematical and IT methods (71%). Among the transversal skills, those most commonly requested are flexibility and the ability to work in a team, also in this case with indications of high importance more frequent for tertiary qualifications than for secondary ones.

However, no significant differences emerge with respect to the level of education or training direction with reference to the request for green skills, for which only in the context of some secondary school diploma directions does the share of requests with high importance exceed 50%.

VERY IMPORTANT SKILLS BY MAIN FIELDS OF STUDY (*)										
Key:	Soft				Green	Technological			Communicative	
from 1% to 33%	Work in a group	Problem solving	Work autonomously	Flexibility and adaptability	Energy saving and environmental sustainability	Use mathematical and computer methods and languages	Use digital skills	Use "4.0" technologies to innovate processes	Communicate company information in Italian	Communicate company information in foreign languages
from 34% to 66%										
from 67% to 100%										
TERTIARY EDUCATION	81%	79%	67%	84%	43%	44%	69%	30%	58%	37%
Economic Specialisation	80%	77%	66%	83%	44%	47%	77%	27%	62%	43%
Teaching and training Specialisation	81%	73%	61%	84%	39%	24%	47%	9%	44%	22%
Health and paramedical Specialisation	72%	72%	56%	84%	27%	18%	27%	13%	43%	9%
Nuove tecnologie per il made in Italy - meccanica	63%	64%	63%	76%	44%	36%	55%	33%	43%	14%
Tecnologie della informazione e della comunicazione	87%	93%	75%	93%	41%	71%	93%	65%	51%	25%
SECONDARY EDUCATION	55%	40%	42%	66%	43%	13%	19%	11%	35%	14%
Specialisation administration, finance and marketing	69%	57%	50%	75%	42%	23%	54%	11%	50%	23%
Catering Specialisation	57%	29%	37%	60%	46%	8%	6%	7%	42%	24%
Specialisation tourism, food and wine and hospitality	69%	46%	50%	73%	53%	15%	17%	14%	52%	39%
Mechanical Specialisation	36%	28%	30%	57%	35%	8%	6%	11%	16%	1%
Specialisation logistics systems and services	35%	23%	28%	55%	32%	7%	2%	7%	18%	1%
High school Diploma	75%	62%	55%	80%	35%	15%	47%	8%	60%	37%
COMPULSORY SCHOOLING	37%	21%	28%	53%	38%	5%	2%	5%	19%	3%

* The companies assign a score ranging from 0 (skill not required) to 4 (skill of the utmost importance) to each skill; the skills considered to be "very important" are those to which the companies assign a score of 3 or 4.

COMPANIES HIRING

Companies with employees that have planned to hire in 2023 are on average 62% of the total (two points more than in 2022). However, in various sectors there are decidedly higher shares and, among these, tourism-catering (77%), healthcare and transport/logistics (both with 73%), construction (71%), as well as public utilities (70%) emerge. (%) and the chemical-pharmaceutical industries (69%).

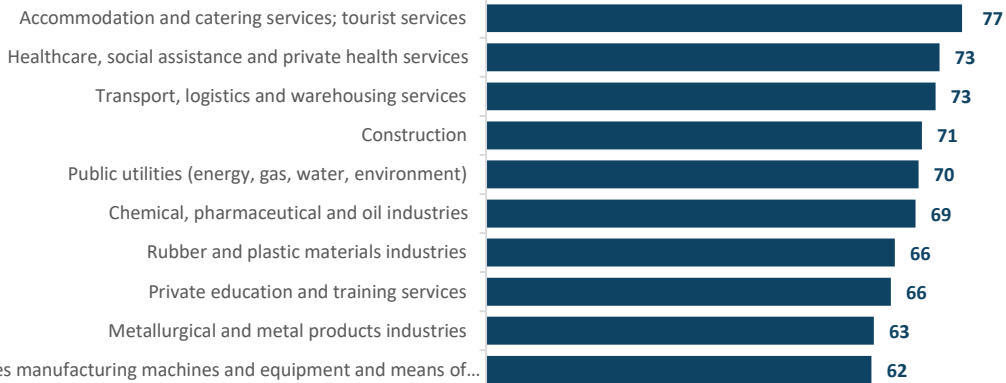
In general, the selection channel most used by hiring companies is direct knowledge of the candidates (indicated in 42% of cases), followed by the curricula received (34%) and indications from known individuals (33%). For larger companies, however, the use of formal and structured channels such as CVs sent by candidates is more frequent (up to 67%) or the use of the web and social channels (up to 36%).

The share of companies with employees that adopted integrated digital investment plans in 2023 reaches 41%; the companies that invest in green skills are 56% of the total.

COMPANIES HIRING IN 2023 BY SECTOR (% of total companies in the sector)

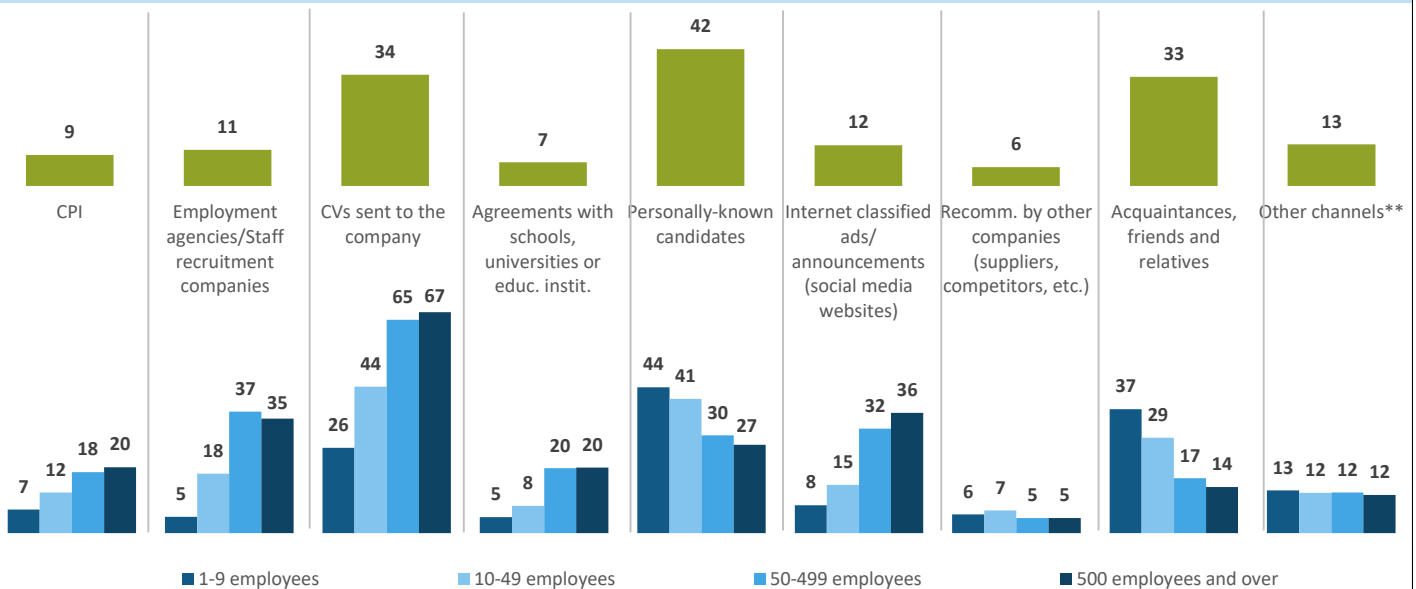
62%

Companies hiring



RECRUITMENT CHANNELS USED BY COMPANIES

(% of total companies that indicate at least one selection channel by size class*)



* This is a multiple choice question on the questionnaire, and the total can exceed 100.

**Trade associations/trade unions, classified ads/announcements in newspapers, labour consultants, other channel

DIGITAL TRANSFORMATION AND GREEN INVESTMENTS

37%

Companies that invested in digital transformation between 2018 and 2022 (out of the total number of companies)



41%

Companies that are investing in digital transformation in 2023 (out of the total number of companies)

54%

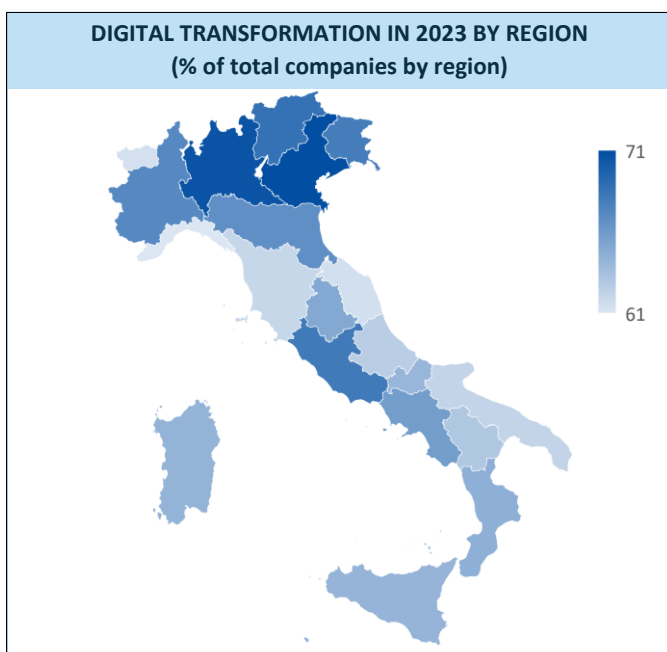
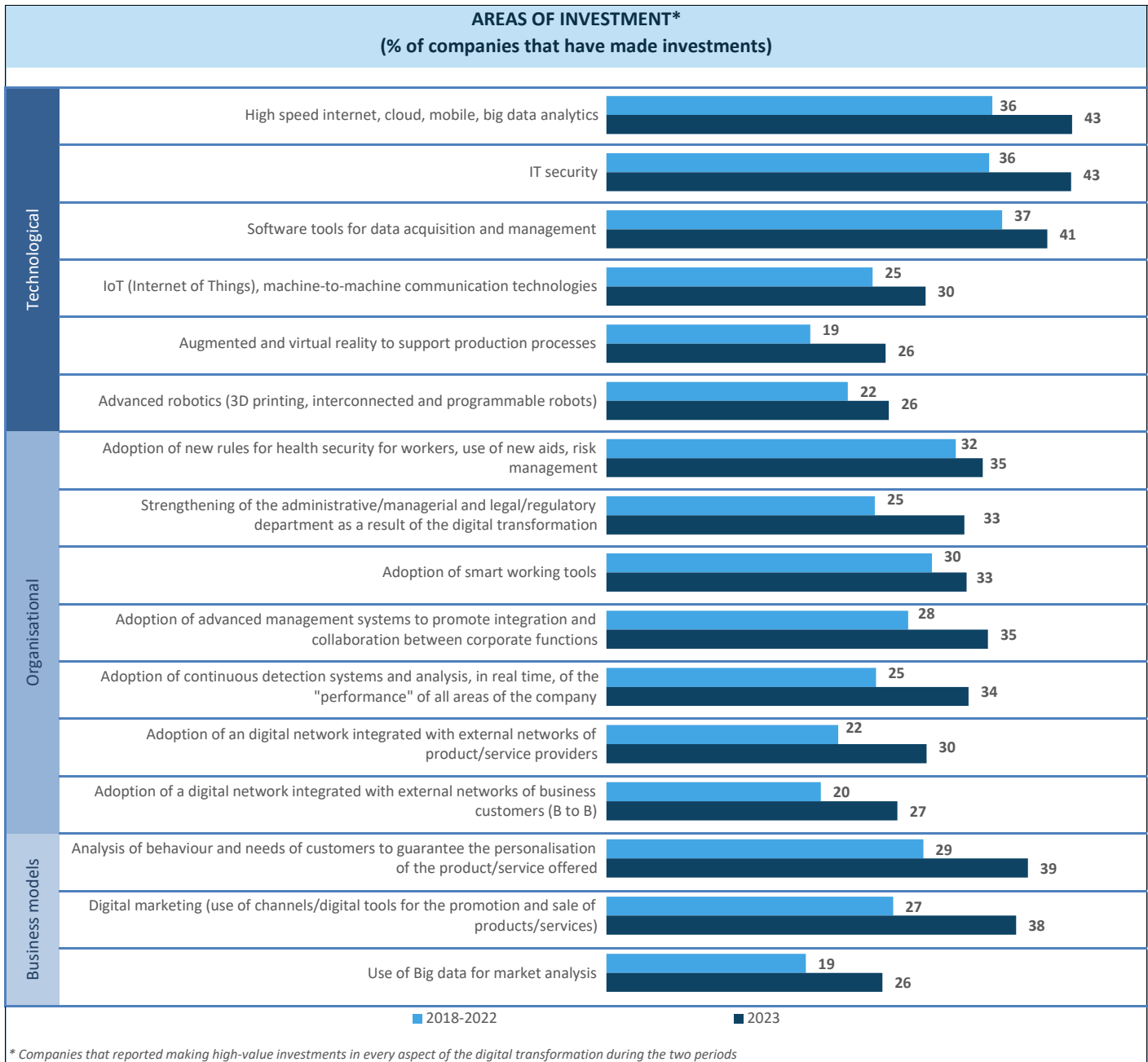
Companies that invested in green skills in 2022 (out of the total number of companies)



56%

Companies that are investing in green skills in 2023 (out of the total number of companies)

COMPANIES INVESTING IN DIGITAL TRANSFORMATION



Considering the different types of investments in digital transformation and their importance from the point of view of companies, in 2023 growth is seen in all areas compared to the period 2018-2022. The most significant investments are made in the technological area and, within it, especially with reference to both high-speed Internet, cloud, mobile, big data, and IT security. In both cases, highly important investments are made by 43% of companies, with significant increases (+7 p.p.) over the period observed. In the context of business models, important investments with significant growth concern in particular the analysis of customer behavior and needs (39% of companies, +10 p.p.) and the development of digital marketing (38%, +11 p.p.). In the organizational sphere, the adoption of continuous detection and analysis systems of the "performance" of all company areas is especially growing (+9 p.p., with 34%). From a territorial point of view, the greater propensity to invest in digital transformation on the part of companies located in Lazio and in the north of the country clearly emerges, with the exception of Valle d'Aosta and Liguria.

ONGOING TRAINING AND SCHOOL/WORK CONNECTION

In 2023, just under 709 thousand companies have organized (or plan to organize) training activities for their employees, equal to 50% of the total companies. Training takes place mainly through coaching or external courses, and to a lesser extent through courses within the company, and is preferentially financed with the company's own resources. There are approximately 360 thousand companies that carry out training through courses, 25% of the total. Training through specific courses carried out (or planned) in 2023 more frequently concerns the field of digitalisation (42% of companies training through courses) compared to the "green" field (30%); however, 48% of companies that activate training courses do not intervene in any of these areas.

COMPANIES THAT CARRY OUT TRAINING COURSES IN 2023

708,940
(no. training companies)



Companies that carried out training courses in 2023



50%
(% of total companies)

360,350
(no. training companies with courses)

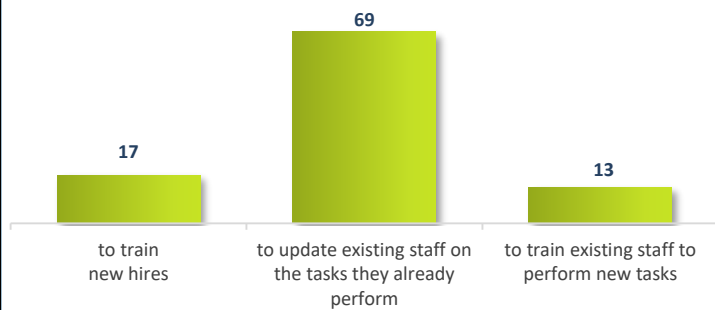


Companies that carried out training courses in 2023



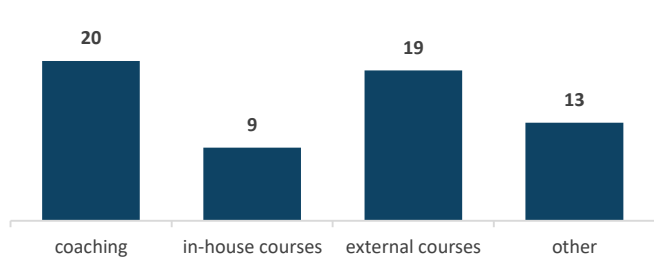
25%
(% of total companies)

COMPANIES BY MAIN PURPOSE OF TRAINING - 2023



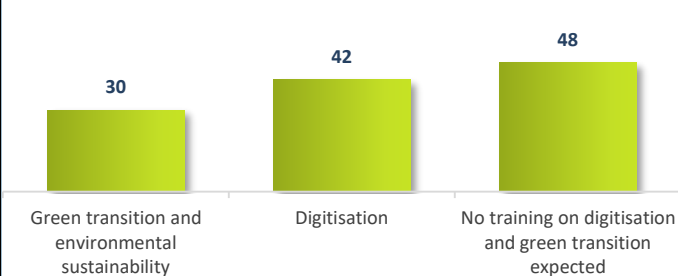
(composition % of total training companies)

COMPANIES BY TRAINING COURSE TYPE - 2023



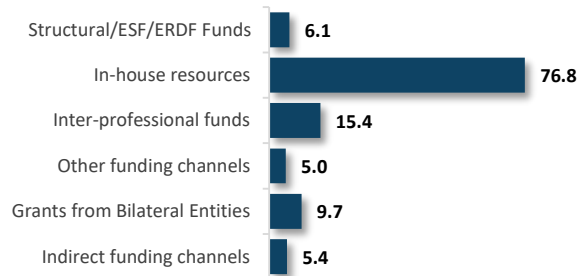
(% of total companies, multiple choice)

COMPANIES BY TRAINING AREA - 2023



(composition % of total training companies with courses)

COMPANIES BY TRAINING FUNDING METHOD - 2023



This is a multiple choice question

(composition % of total training companies with courses)

APPRENTICESHIP ACTIVITIES

Companies that hosted apprentices in 2022

13%

In 2022, 13% of companies (with employees) hosted at least one student on an internship, highlighting a slight increase compared to the 12% recorded in 2021. Among the interns hosted, more than one in four had formalized (or planned) hiring during 2023.

Number of apprentices hired in 2023

26%

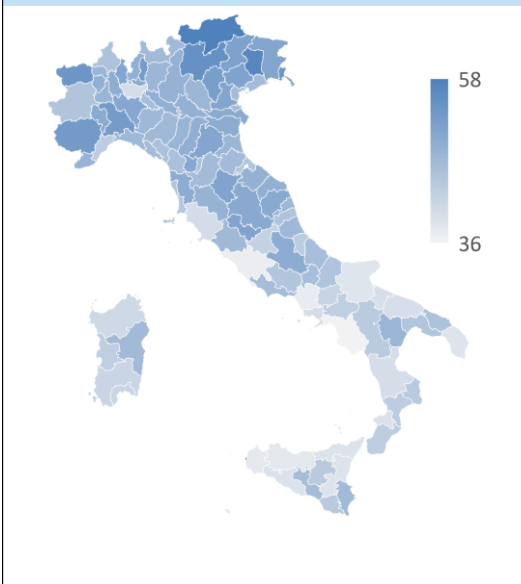
INFLOW IN THE VARIOUS REGIONS

Almost half of the revenues planned in 2023 are concentrated in four regions: Lombardy (20% of total revenues), Veneto, Lazio (each with 10%) and Emilia-Romagna (9%). The most significant procurement difficulties are recorded in the North East area (50.4%), where all regions show percentages higher than the national average (which is equal to 45.1%). Even in the North West and Central areas, most regions are above average (the only exceptions are Lombardy and Lazio); in the South, however, procurement problems are more limited, with percentages slightly higher than average only in Abruzzo, Basilicata and Molise.

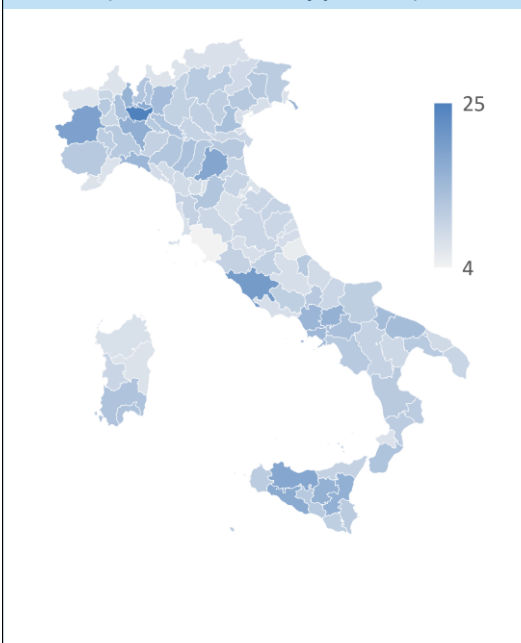
As regards the growth in revenue compared to 2022, this is more marked in the Central area, favored by the changes in Lazio (+12%) and Tuscany (+12.8%). The greatest increases in the number of entries are generally recorded in regions with a prevalent tourist vocation, precisely by virtue of the growth of the sector; the greatest variations, after those of Lazio and Tuscany, are in fact observed in Valle d'Aosta (+11.5%), in Campania (+10.2%), in Trentino-Alto Adige (+8.6%) and in Liguria (+7.1%). In the Southern area, with the sole exception of Campania, the growth in revenue in the tourism sector has had a very limited impact: only Calabria and Sardinia show variations slightly higher than the average (equal to 6.7-6.8 %) while in the other regions the number of entries remained substantially stable.

	TOTAL INFLOW (a.v.)	% difficult to recruit	% university graduates	variation % 2023/2022
ITALY	5,509,130	45.1	13.9	6.4
NORTH WEST	1,607,100	45.9	17.3	5.3
NORTH EAST	1,308,580	50.4	11.4	5.1
CENTRAL	1,131,290	43.2	13.8	11.0
SOUTH AND ISLANDS	1,462,150	40.9	12.6	5.4
PIEMONTE	353,930	47.8	15.7	2.4
VALLE D'AOSTA	18,870	54.2	6.8	11.5
LOMBARDIA	1,092,950	45.0	18.8	5.9
LIGURIA	141,360	46.7	12.0	7.1
TRENTINO ALTO ADIGE	173,030	56.7	9.4	8.6
VENETO	526,610	49.8	10.7	4.8
FRIULI VENEZIA GIULIA	113,700	52.7	11.9	5.2
EMILIA ROMAGNA	495,240	48.5	12.7	4.2
TOSCANA	368,490	46.9	9.5	12.8
UMBRIA	64,810	50.5	9.1	5.1
MARCHE	140,610	48.6	9.3	5.1
LAZIO	557,380	38.5	18.4	12.0
ABRUZZO	116,720	46.6	8.3	2.3
MOLISE	19,080	45.3	10.1	1.4
CAMPANIA	436,150	39.0	14.3	10.2
PUGLIA	291,890	40.6	11.9	0.8
BASILICATA	35,950	45.4	9.7	-2.4
CALABRIA	108,250	41.7	11.4	6.7
SICILIA	301,190	40.2	14.6	4.6
SARDEGNA	152,940	42.0	10.0	6.8

DEMAND FOR UNIVERSITY GRADUATES IN THE VARIOUS REGIONS
(% of total inflow by province)



DEMAND FOR UNIVERSITY GRADUATES IN THE VARIOUS REGIONS
(% of total inflow by province)

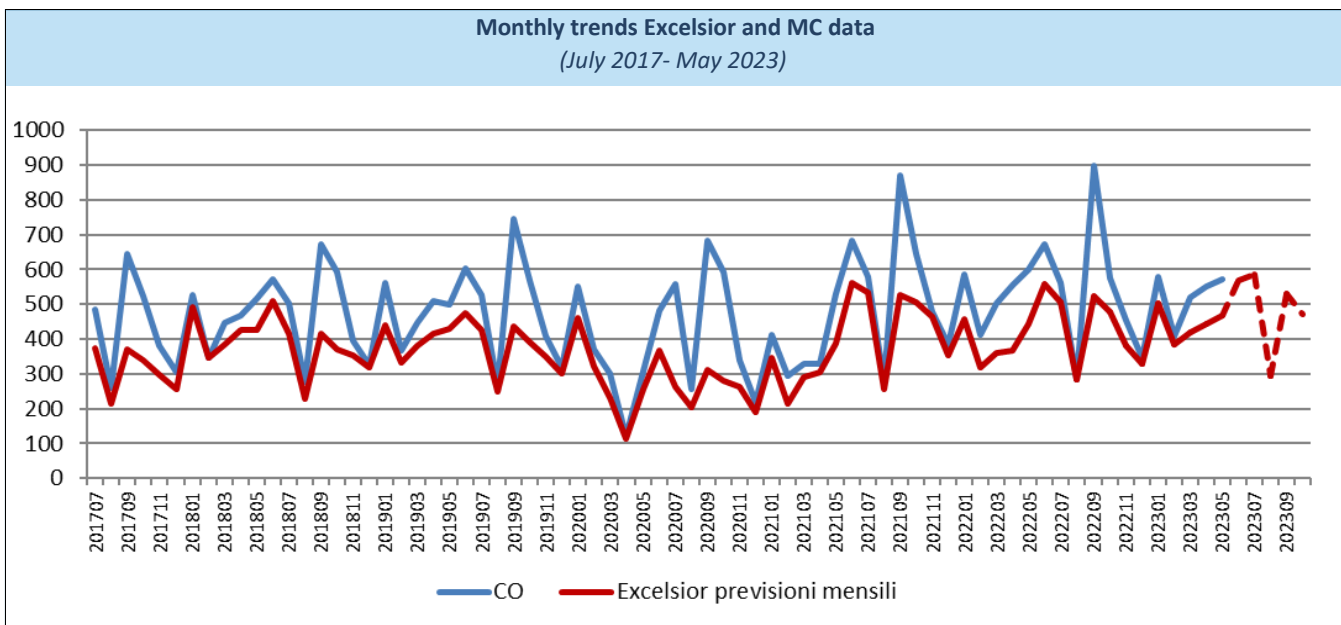


NOTE ON METHODOLOGY

The data presented comes from the Excelsior survey carried out by Unioncamere in agreement with the National Agency for Active Labor Policies (ANPAL). The survey, which is included in the National Statistical Program (UCC-00007) among those that require a response, has been carried out on a monthly basis since 2017.

The information contained in this bulletin was acquired by treating all the administrative information and that deriving from the monthly surveys available until October 2023. The monthly surveys were carried out mainly using the CAWI compilation technique and carrying out approximately 275,000 interviews at the companies, representative sample of companies with employees by 2022 in the various industrial and service sectors. The estimate of the forecast of income flows is obtained by modeling the historical series of data taken from administrative sources on businesses and employment, appropriately integrated with the sample data relating to each monthly survey. Revenue (i.e. the number of employment contracts that companies intend to stipulate in a certain period) and the related characteristics refer to the hiring of employees and the flows of collaborators, temporary workers and other non-employed workers. The data relating to the forecasts for the entire year therefore no longer derive from a specific annual survey, but from the integrated processing of the available monthly surveys.

The following graph compares the data on the Excelsior monthly forecasts with the final data taken from the Mandatory Communications of the Ministry of Labor. The data of the mandatory communications are processed in such a way as to be brought back to the field of observation of the Excelsior Project, through the exclusion of contracts of less than 30 days, of the Agriculture, Forestry and Fisheries sectors (Ateco 01-02-03), of the Public Administration (Ateco 84) and Activities of families and partnerships as employers of domestic staff, production of undifferentiated goods and services for their own use by families and partnerships (Ateco 97-98-99). The operations of bringing the CO back to the Excelsior observation field, although not allowing an alignment of the struts - due to the structure of the data supply made available - highlights a correlation between the two series equal to 81% for the period July 2017 - May 2023.



In this bulletin the analysis focuses mainly on the characteristics of the income planned for the year 2023, according to the professional profiles and levels of education required. There are also some qualitative comparisons with the 2022 data. The results of the survey are available at provincial and regional level according to a variable number of economic sectors, obtained as a merger of economic activity codes of the ATECO2007 classification. The distribution of expected revenue by "professional group" refers to the codes of the ISTAT CP2021 classification.

Excelsior Informa is created by Unioncamere in collaboration with ANPAL as part of the Excelsior Information System.

For further information, please consult the website: <http://excelsior.unioncamere.net> where data and analyzes relating to all regions and provinces are available.

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