EXCELSIOR INFORMA
COMPANY EMPLOYMENT SCHEMES OBTAINED FROM THE CHAMBER OF COMMERCE SYSTEM
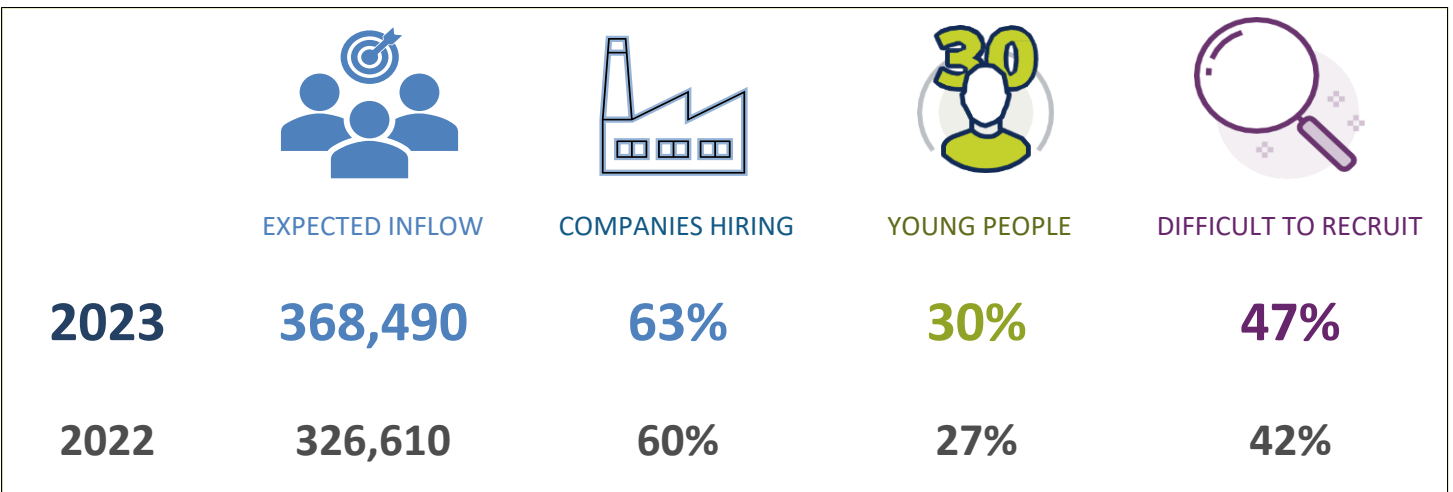
Year 2023
Toscana

Introduction

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%, will be the increase in the number of workers joining the company workforce, which this year will reach 5.5 million units (compared to 5.2 in the previous year). The improvement in the Excelsior indicators is in line with the main labor market indicators detected by ISTAT, which in the second quarter of 2023 signal an increase in the employment rate (+1.2 points compared to the second quarter of 2022) and, at the same time , a reduction in the unemployment rate (-0.5 points).

However, the growth in demand for labor is accompanied by a greater difficulty for companies in finding the desired profiles, a problem which affects 45% of planned revenues in 2023 (compared to 41% the previous year) and which mainly derives (for approximately two cases out of three) from an insufficient presence of people in the labor market available to join the company. However, problems linked to the inadequacy of candidate preparation with respect to the needs of companies are less frequent (one case in three).
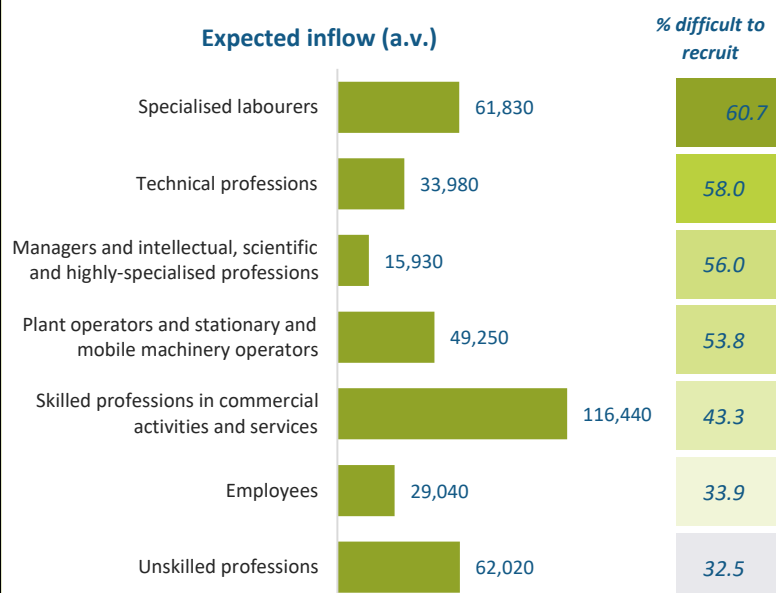
This publication focuses on the main characteristics of the revenues planned in the region for the year 2023.

	EXPECTED INFLOW	COMPANIES HIRING	YOUNG PEOPLE	DIFFICULT TO RECRUIT
2023	**368,490**	**63%**	**30%**	**47%**
2022	326,610	60%	27%	42%

SUMMARY

Work opportunities in 2023 in the region

Expected inflow (a.v.)		% difficult to recruit
Specialised labourers	61,830	60.7
Technical professions	33,980	58.0
Managers and intellectual, scientific and highly-specialised professions	15,930	56.0
Plant operators and stationary and mobile machinery operators	49,250	53.8
Skilled professions in commercial activities and services	116,440	43.3
Employees	29,040	33.9
Unskilled professions	62,020	32.5

N.B. Due to the rounding off, the sum of the single percentage values may differ by 100. This note is valid for all the graphs in this bulletin that show percentage compositions.

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COMPANY AREAS OF INCLUSION AND MAIN PROFESSIONS

This page shows the main company areas of inclusion, with several characteristics regarding inflow, and the professions most requested by companies for 2022 in the region. It should be noted that, unless otherwise specified, the professions indicated in the bulletin refer to the classification of professions of ISTAT CP2021 (3 digit).

Characteristics of expected inflow by business area in the region in 2023

BUSINESS AREA	INFLOW (a.v.)	% of total	% up to 29 years	% difficult to recruit
Total	368,490	100.0	30.0	46.9
Direction and General services areas	12,460	3.4	32.1	45.3
Administrative areas	13,770	3.7	21.8	41.1
Technical and planning areas	43,600	11.8	31.1	57.6
Area of production of goods and provision of the service	194,860	52.9	27.1	49.1
Commercial and sales areas	64,110	17.4	42.5	36.1
Logistics areas	39,690	10.8	24.7	44.7

The sectors that expect more inflow in the region in 2023 (a.v.)

Sector	Inflow
Accommodation and catering services; tourist services	92,000
Retail trade, wholesale trade and repair of motor vehicles and motorcycles	47,500
Textile, clothing and footwear industries	34,520
Construction	30,090
Operational support services for businesses and individuals	28,500

The professions most requested in the region in 2023

of which difficult to recruit (%)

Profession	Inflow	of which difficult to recruit (%)
522-Trainers and employees in catering activities	71,000	49
814-Unqualified staff in cleaning services	35,880	34
512-Sales employees	29,770	27
612-Specialized workers involved in the construction and maintenance of building structures	18,260	30
742-Drivers of motor and animal-drawn vehicles	14,460	65
813-Unqualified personnel responsible for moving and delivering goods	14,010	60

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MAIN CHARACTERISTICS OF WORKERS REQUESTED BY COMPANIES

The main characteristics of the incoming figures are summarised below, organised by sector. The data concerns the difficulties in recruiting, experience required, gender and type of contract requested; the figure for the region is compared with that of the geographical distribution and the national figure.
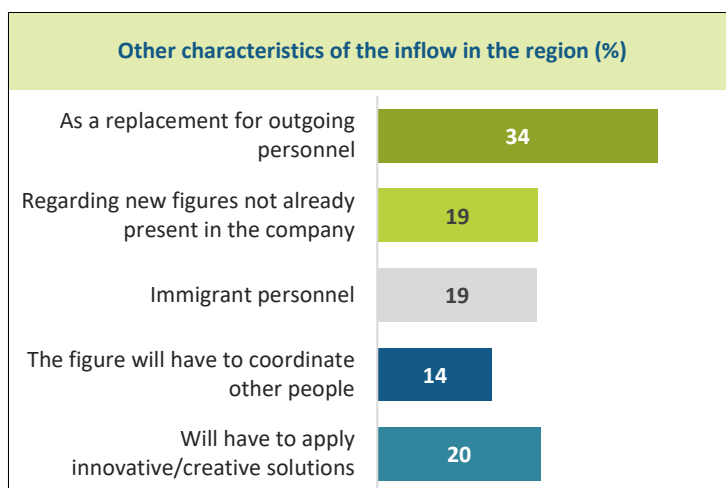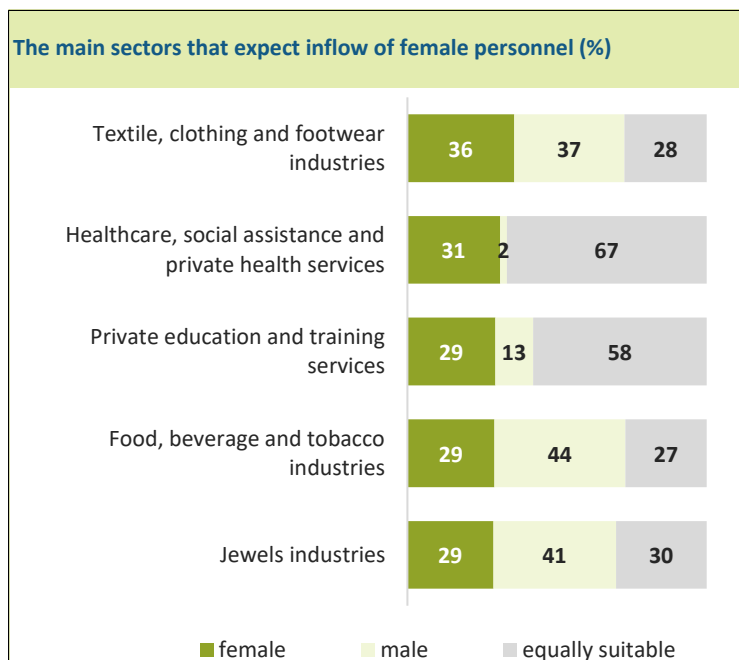
Difficulty in recruiting (%)	Reg.	Central	Italia
Total, of which:	**46.9**	**43.2**	**45.1**
for lack of candidates	29.3	26.9	28.4
due to inadequate skill set	13.0	12.2	12.4
for other reasons	4.6	4.1	4.3

Experience requested (%)	Reg.	Central	Italia
Total, of which:	**63.7**	**65.7**	**65.3**
in the profession	19.7	21.5	22.2
in the sector	44.1	44.2	43.1
non requested	36.3	34.3	34.7

The regional sectors...

...with greatest DIFFICULTIES IN RECRUITING and the reasons (%)

Sector	Lack of candidates	Inadequate skill set	Other reasons
Wood and furniture industries	39	22	5
Construction	40	18	4
Industries manufacturing machines and equipment and means of transport	38	18	4
Metallurgical and metal products industries	38	18	2
IT and telecommunications services	32	22	4

...that request specific work EXPERIENCE the most (%)

Sector	Experience in the profession	Experience in the sector
Healthcare, social assistance and private health services	53	30
Private education and training services	44	33
IT and telecommunications services	36	40
Textile, clothing and footwear industries	23	51
Construction	17	56

Gender requested (%)	Reg.	Central	Italia
female	**21.0**	**18.8**	**18.0**
male	31.5	30.3	31.8
equally suitable	47.5	50.9	50.2

Contracts proposed (% values)	Reg.	Central	Italia
Workers employed by the company	**85.2**	**83.9**	**83.2**
with a permanent contract	19.6	19.5	19.7
with a fixed-term contract	54.3	54.1	54.2
with other contracts	11.3	10.3	9.3
Company non-salaried workers	**14.8**	**16.1**	**16.8**
agency workers	8.6	8.4	9.6
coll. and other non-salaried empl.	6.2	7.7	7.2

The main sectors that expect inflow of female personnel (%)

Sector	female	male	equally suitable
Textile, clothing and footwear industries	36	37	28
Healthcare, social assistance and private health services	31	2	67
Private education and training services	29	13	58
Food, beverage and tobacco industries	29	44	27
Jewels industries	29	41	30

Other characteristics of the inflow in the region (%)

As a replacement for outgoing personnel	34
Regarding new figures not already present in the company	19
Immigrant personnel	19
The figure will have to coordinate other people	14
Will have to apply innovative/creative solutions	20

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CHARACTERISTICS OF INFLOW BY AGE GROUP

Expected inflow by age group in the region (%)

indifferent
28%

up to 29 years
30%

over 44 years
8%

30-44 years
34%

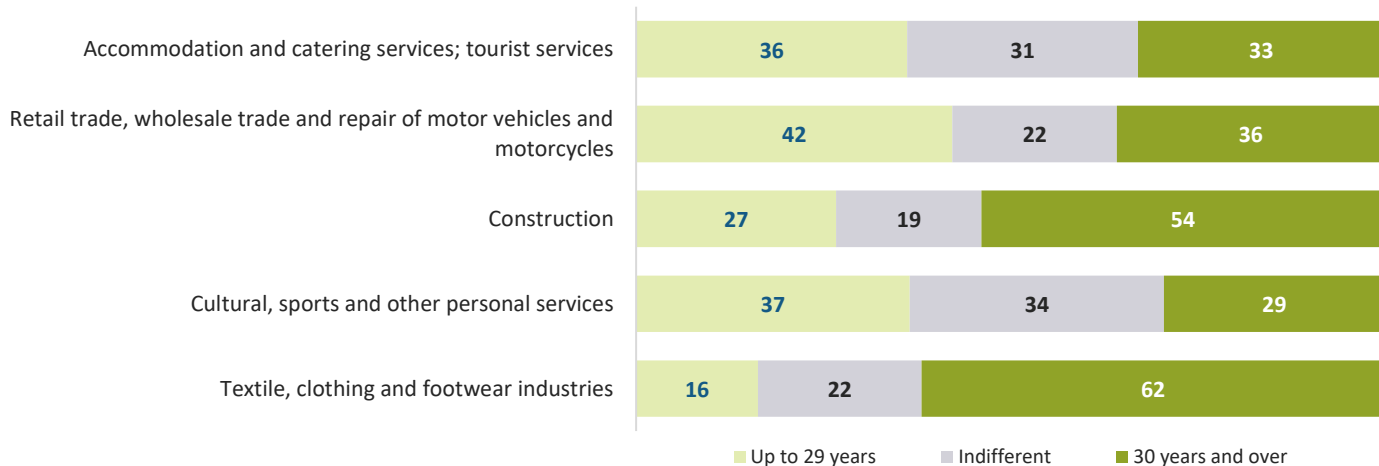**% of young people up to 29 years against the total inflow:**

30.0%
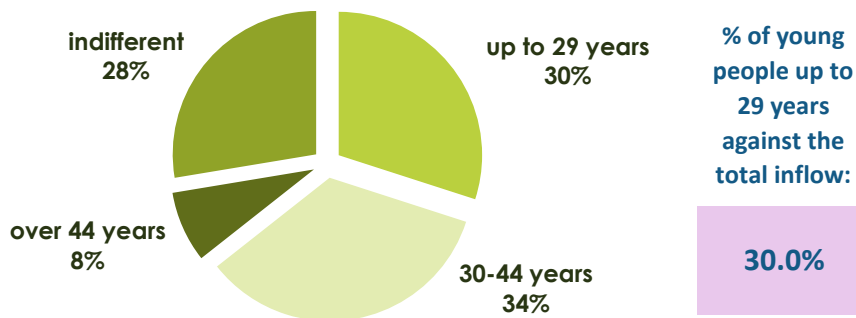
A specific detailed study concerns the age groups of the professional figures requested by companies in the region in 2023, with a detailed breakdown of the professions most requested and of the main business sectors that plan inflow from the younger segment, i.e. the figures with an age explicitly indicated by companies as "up to 29 years".
The report that includes "difficulties in recruiting" offers key ideas for analysis with regard to the relationship between training and companies.

The professions with the greatest difficulty in recruiting young people
(expected inflow of young people - % share and a.v.)

Average difficulty in recruiting young people
Toscana region 48%

Profession	%	difficult to recruit young people	Inflow of young people
Engineering technicians	79%	1,030	1,300
Specialized workers assigned to finishing constructions	73%	2,760	3,770
Drivers of motor and animal-drawn vehicles	72%	1,040	1,450
Automatic and semi-automatic machine operators. for processing metal and prod. minerals	69%	1,120	1,610
Blacksmiths, tool makers	69%	710	1,030
Health technicians	68%	870	1,280
Casters, welders, tinsmiths, boilermakers, metal carpentry assemblers	66%	840	1,270
IT, telematics and telecommunications technicians	61%	1,120	1,840
Specialized workers installation/maintenance of electrical/electronic equipment	59%	1,110	1,870
Craft mechanics, fitters, repairers, maintenance workers on fixed/mobile machines	55%	1,660	3,030

The main business sectors seeking young people in the region (%)

Sector	Up to 29 years	Indifferent	30 years and over
Accommodation and catering services; tourist services	36	31	33
Retail trade, wholesale trade and repair of motor vehicles and motorcycles	42	22	36
Construction	27	19	54
Cultural, sports and other personal services	37	34	29
Textile, clothing and footwear industries	16	22	62

■ Up to 29 years ■ Indifferent ■ 30 years and over
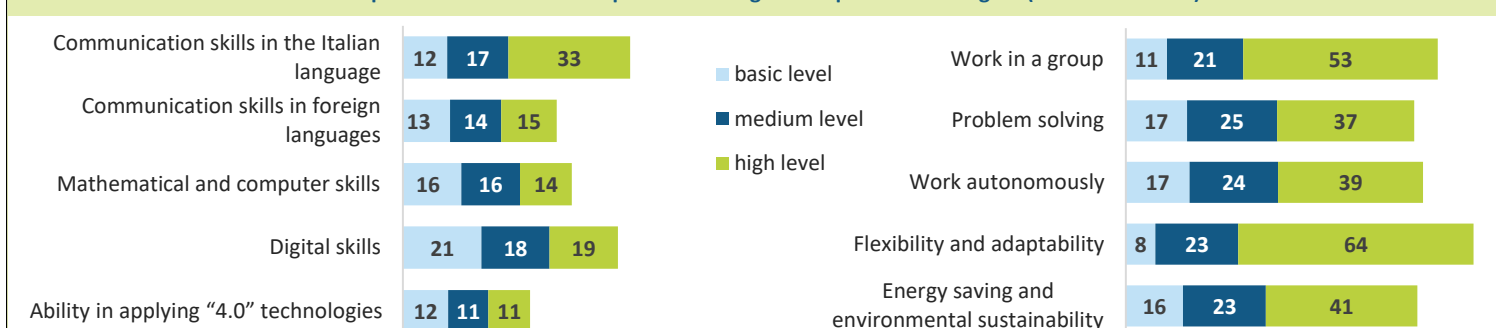
The top sectors for inflow of young people up to 29 years have been selected, as an absolute value

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SKILLS REQUESTED

A skill is the "proven ability to use, in work situations or in professional and personal development, a structured set of knowledge and skills acquired in formal, non-formal or informal learning contexts". This section analyses some of the main skills required by companies for incoming profiles, as well as an in-depth analysis of the main fields of study in the territory and the skills required for each of them.

The importance of skills for the professional figures required in the region (% of total inflow)

	basic level	medium level	high level
Communication skills in the Italian language	12	17	33
Communication skills in foreign languages	13	14	15
Mathematical and computer skills	16	16	14
Digital skills	21	18	19
Ability in applying "4.0" technologies	12	11	11

	basic level	medium level	high level
Work in a group	11	21	53
Problem solving	17	25	37
Work autonomously	17	24	39
Flexibility and adaptability	8	23	64
Energy saving and environmental sustainability	16	23	41

The companies assign each skill a score from 0 (non-requested skill) to 4: the basic level corresponds to the percentage of companies that assign a score of 1 to that skill, the medium level a score of 2 and the high level a score of 3 or 4.

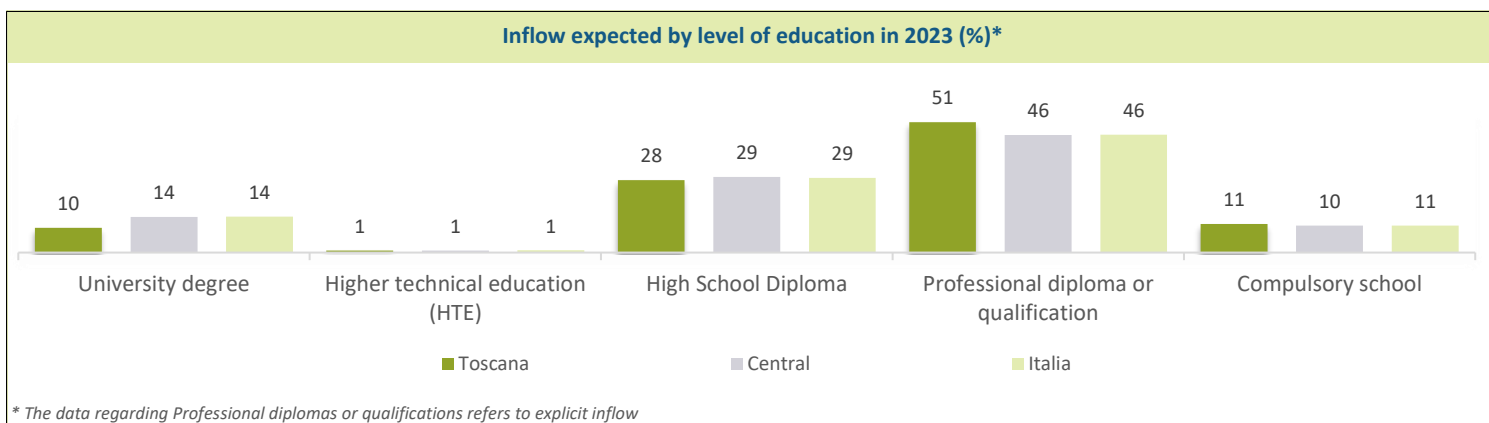## Skills considered of "high" importance according to the main fields of study in the region*

Key:
- from 1% to 33%
- from 34% to 66%
- from 67% to 100%

	Soft				Green	Technological				Communicative	
	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
UNIVERSITY	**81%**	**78%**	**66%**	**84%**	**45%**	**43%**	**68%**	**27%**	**59%**	**39%**
Economics specialisation	80%	75%	64%	83%	45%	45%	74%	22%	59%	41%
Teaching and education specialisation	84%	75%	58%	81%	37%	24%	45%	7%	40%	26%
Industrial engineering specialisation	89%	89%	76%	90%	63%	66%	87%	52%	68%	50%
HIGHER TECHNICAL EDUCATION (HTE) (ITS Academy)	**72%**	**64%**	**59%**	**79%**	**50%**	**42%**	**62%**	**39%**	**48%**	**26%**
SECONDARY (5-year diploma)	**68%**	**51%**	**48%**	**74%**	**45%**	**19%**	**32%**	**14%**	**45%**	**23%**
Administration, finance and marketing specialisation	73%	55%	48%	79%	42%	23%	53%	11%	53%	26%
Tourism, food and wine and hospitality specialisation	70%	41%	48%	71%	57%	13%	18%	16%	54%	43%
Mechanics, mechatronics and energy specialisation	53%	49%	43%	67%	40%	20%	23%	21%	25%	6%
Professional QUALIFICATION (3-year) or professional DIPLOMA (4-year)	**44%**	**25%**	**33%**	**57%**	**40%**	**8%**	**5%**	**8%**	**26%**	**9%**
Catering specialisation	52%	25%	36%	55%	46%	9%	6%	10%	41%	24%
Mechanical specialisation	35%	28%	27%	53%	35%	11%	5%	14%	15%	1%
Textile and clothing specialisation	31%	12%	19%	50%	37%	2%	2%	2%	6%	0%

* The skills with "high" importance are those to which the companies assign a score of 3 or 4.
** The data refers to the potential inflow with a professional diploma or qualification. Please refer to the introductory text on page 6 "The fields of study that offer greatest job opportunities" for the definition of potential inflow.

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FIELDS OF STUDY THAT OFFER THE GREATEST JOB OPPORTUNITIES

Below, there is some data related to the levels of education and qualifications most requested of the inflow of professional figures in 2023. Data on the demand for workers with professional diplomas or qualifications is presented based on two different approaches. In fact, in addition to workers with professional diplomas and qualifications expressly indicated ("explicit inflow"), companies are looking for workers who generically went through "compulsory education". With a specific in-depth study, there have been cases in which the request for workers who have generically gone through "compulsory education" was associated with professions for which there are three-year professional training courses formally included among the 26 in the State Regional Agreement of 1 August 2019. A further potential demand for professional qualifications was thus identified and, when added to the demand explicitly expressed by the companies as part of the survey, provides an overall estimate of the "potential inflow" expected by the companies for which a professional qualification is required.
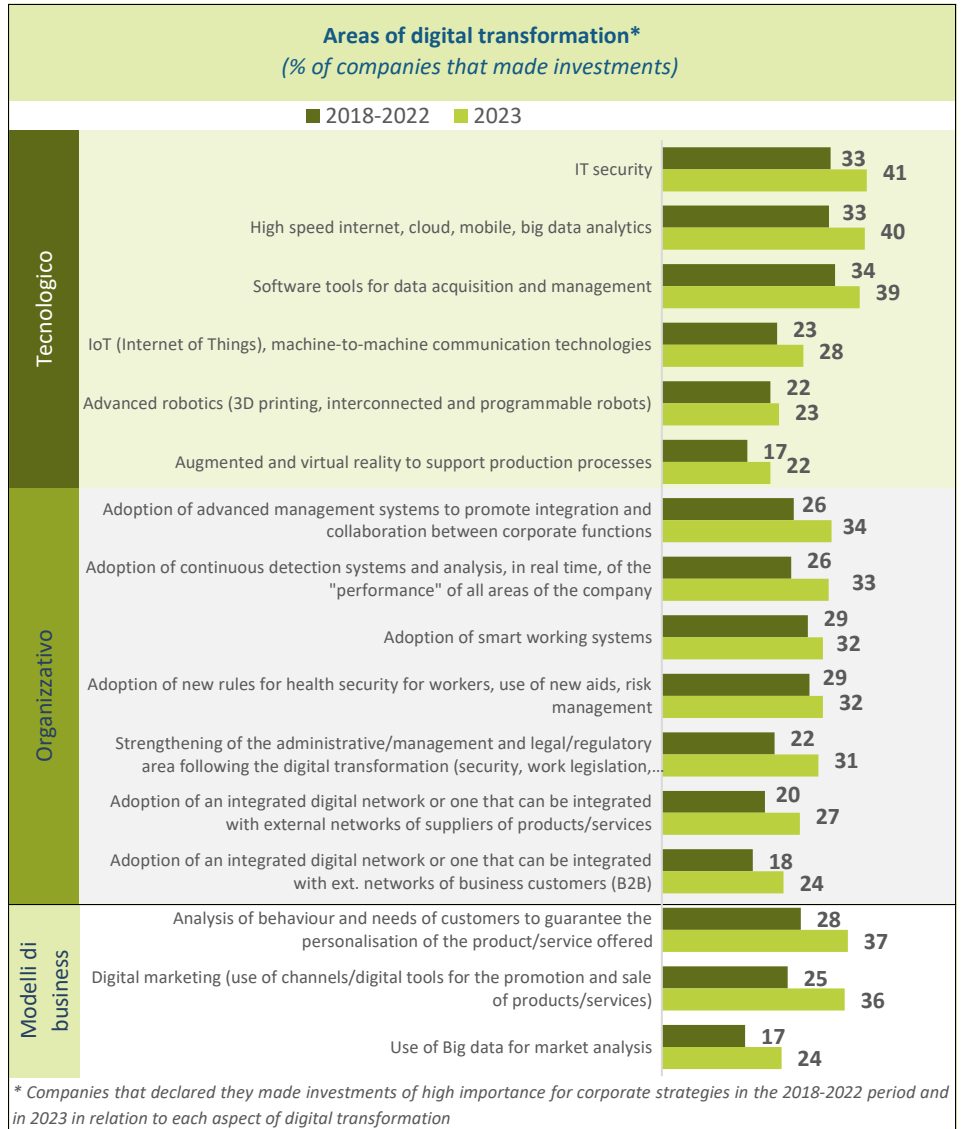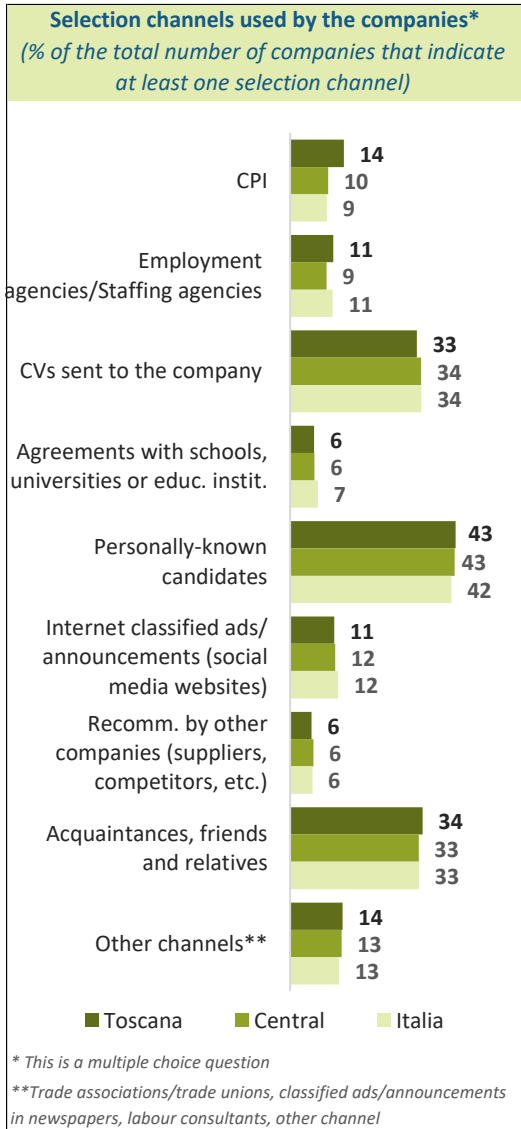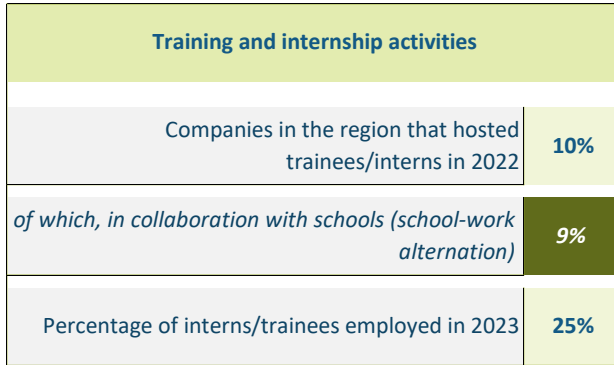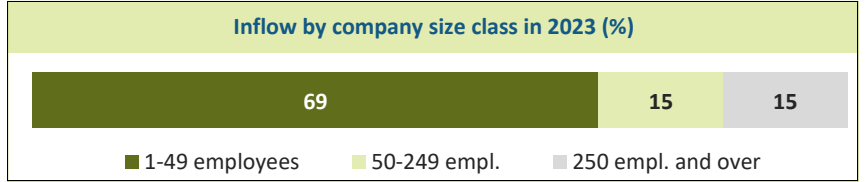
Inflow expected by level of education in 2023 (%)*

	University degree	Higher technical education (HTE)	High School Diploma	Professional diploma or qualification	Compulsory school
Toscana	10	1	28	51	11
Central	14	1	29	46	10
Italia	14	1	29	46	11

■ Toscana ■ Central ■ Italia

* The data regarding Professional diplomas or qualifications refers to explicit inflow

The fields of study most highly requested in the region

		Expected inflow (a.v.)	% of the total	% difficult to recruit	% with experience
University		**35,190**	**10%**	**56%**	**87%**
of whom with post-graduate education		*4,261*	*12%*	*61%*	*96%*
Economics specialisation		10,120		49%	78%
Teaching and education specialisation		4,730		45%	93%
Industrial engineering specialisation		2,860		65%	93%
Higher technical education (HTE) ITS Academy		**2,690**	**1%**	**65%**	**81%**
SECONDARY (5-year diploma)		**103,670**	**28%**	**48%**	**67%**
Administration, finance and marketing specialisation		28,480		33%	58%
Tourism, food and wine and hospitality specialisation		22,950		58%	75%
Mechanics, mechatronics and energy specialisation		8,130		61%	70%
Professional qualification (3-year) or	**explicit inflow**	**145,110**	**39%**	**47%**	**60%**
professional diploma (4-year)	**potential inflow**	**186,210**	**51%**	**46%**	**60%**
Catering specialisation	explicit inflow / potential inflow	34,070 / 44,250		45%	65%
Mechanical specialisation	explicit inflow / potential inflow	17,530 / 21,240		61%	55%
Textile and clothing specialisation	explicit inflow / potential inflow	8,000 / 16,490		46%	69%

■ explicit inflow ■ potential inflow

The percentages of difficult to recruit inflow and inflow with experience refer to explicit inflow

Compulsory school	**explicit inflow**	**81,840**	**22%**	**40%**	**56%**
	potential inflow	**40,730**	**11%**	**38%**	**48%**

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SOME CHARACTERISTICS OF THE COMPANIES

This page presents several characteristics of the companies that are hiring, highlighting the relative share of the total number of companies with employees present in the region, and detailed breakdown by size class. The training carried out by companies for their employees in 2021 and 2022 and the share of companies that hosted trainees/interns in 2022 is also analysed. The page also presents some data on the investments made by companies in the various areas of digital transformation in 2023 and on the channels for selecting incoming personnel.

Companies hiring in 2023

Companies hiring against the total number of companies with employees in the region:	**63%**

Inflow by company size class in 2023 (%)

69	15	15

■ 1-49 employees　■ 50-249 empl.　■ 250 empl. and over

Training and internship activities

Companies in the region that hosted trainees/interns in 2022	**10%**
of which, in collaboration with schools (school-work alternation)	*9%*
Percentage of interns/trainees employed in 2023	**25%**

Companies that held training courses for its employees *(% of total companies)*

■ 2022　■ 2023

	Toscana	Central	Italia
2022	25	24	26
2023	24	23	25

Selection channels used by the companies*
(% of the total number of companies that indicate at least one selection channel)

	Toscana	Central	Italia
CPI	14	10	9
Employment agencies/Staffing agencies	11	9	11
CVs sent to the company	33	34	34
Agreements with schools, universities or educ. instit.	6	6	7
Personally-known candidates	43	43	42
Internet classified ads/ announcements (social media websites)	11	12	12
Recomm. by other companies (suppliers, competitors, etc.)	6	6	6
Acquaintances, friends and relatives	34	33	33
Other channels**	14	13	13

■ Toscana　■ Central　■ Italia

* This is a multiple choice question

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

Areas of digital transformation*
(% of companies that made investments)

■ 2018-2022　■ 2023

Tecnologico

	2018-2022	2023
IT security	33	41
High speed internet, cloud, mobile, big data analytics	33	40
Software tools for data acquisition and management	34	39
IoT (Internet of Things), machine-to-machine communication technologies	23	28
Advanced robotics (3D printing, interconnected and programmable robots)	22	23
Augmented and virtual reality to support production processes	17	22

Organizzativo

	2018-2022	2023
Adoption of advanced management systems to promote integration and collaboration between corporate functions	26	34
Adoption of continuous detection systems and analysis, in real time, of the "performance" of all areas of the company	26	33
Adoption of smart working systems	29	32
Adoption of new rules for health security for workers, use of new aids, risk management	29	32
Strengthening of the administrative/management and legal/regulatory area following the digital transformation (security, work legislation,...	22	31
Adoption of an integrated digital network or one that can be integrated with external networks of suppliers of products/services	20	27
Adoption of an integrated digital network or one that can be integrated with ext. networks of business customers (B2B)	18	24

Modelli di business

	2018-2022	2023
Analysis of behaviour and needs of customers to guarantee the personalisation of the product/service offered	28	37
Digital marketing (use of channels/digital tools for the promotion and sale of products/services)	25	36
Use of Big data for market analysis	17	24

* Companies that declared they made investments of high importance for corporate strategies in the 2018-2022 period and in 2023 in relation to each aspect of digital transformation

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NOTE ON METHODOLOGY

The data presented came from the Excelsior survey carried out by Unioncamere in agreement with the National Agency for Active Labor Policies. 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 processing all the information obtained through the monthly surveys carried out until August 2023, mainly using the CAWI compilation technique and carrying out approximately 275,000 interviews with companies, a representative sample of companies with employees to 2022 of 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.

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.