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AMIL Alliance Multi-stakeholders for Migrants Integration and Labour



Research Report: Sector Studies

- Short Version -

Guide to Identifying Employment Opportunities Based on the Needs of Productive Enterprises



Research Report Labour Market in Italy – Short Version

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Executive Summary and Rationale

The **objective of this report** is to define a methodology that assists operators in **identifying job opportunities consistent with the individual characteristics of the project's direct beneficiaries**, specifically **Third-Country Nationals (TCNs)**. The aim is to **promote greater employability and social and economic inclusion**.

More specifically, the project seeks to promote employment as a means of integration for **refugees, asylum seekers, those with subsidiary protection, and former unaccompanied foreign minors**, with particular attention to **women to address the gender gap in migration**. This involves ensuring **equal access to information and specialised gender-aware information**.

The essential precondition for implementing this methodology is the **activation of a mandatory career guidance pathway**. In short, this involves **identifying the beneficiary's characteristics, aptitudes, propensities, acquired skills, personal challenges, and frame of reference**.

The operators involved certainly possess the necessary skills for this process, but the fundamental difficulty often remains **identifying companies willing to consider including these beneficiaries in their production system**.

In our opinion, this difficulty stems from the following issues:

- **Operator skills**
- **Business system awareness**
- **The use of a needs-adapted methodology**

The extent of this difficulty is specified below.

Analysis of Challenges

Operator Skills

The **vast majority of operators** acting as guidance counsellors have professional training focused on **taking charge of the Beneficiary** (e.g., educationalists, psychologists, social workers). They often have **little familiarity with the work context**, including **labour market dynamics, the needs of local companies**, and **identifying specific employment requirements**.

This problem is often mitigated by **building a network of selected companies**. This awareness-raising of the production system is often fostered "incidentally" through the **personal networks of individual operators** and the companies they are associated with. This is a **necessary but insufficient condition** to meet the needs expressed by the Beneficiaries.

It is therefore essential to adopt a **more efficient method for activating the integration process**—one that can be **managed by those without specific training in the economic field**.

Business System Awareness

The AMIL beneficiaries, categorised as "**vulnerable groups**," inherently face difficulties in finding work due to **social prejudices that constitute significant impediments**. For example, the EU Action Plan 2021–2027 recognises that **migrant women face intersectional structural barriers** related to both gender and migrant status. Indeed, their **employment rate is 20 percentage points lower than for national women in the EU** (Eurostat 2023 data).

This challenge can be addressed by **raising awareness within the local business system** through the targeted **establishment of functional networks**. The AMIL (*Alliance Multi-stakeholders for Migrants Integration and Labour*) project is currently experimenting with the **MEIC** (*Migrants Economic Integration Cluster*) methodology for this very action.

The Use of a Needs-Adapted Methodology

Given these prerequisites, the objective of using a "**method that can be managed by those who do not have specific training in the economic field**" substantiates this **Research/Action Report**.

It is based on the knowledge that **databases are available to operators**—both in tools produced by the European Commission and in all member countries—that are **useful for identifying employment needs, vacancies, training needs, labour market trends, and supply-demand matching issues**.

The central task was to **identify possible interactions between these various databases** to construct a tool that correlates the information usable by job seekers. The **key is to correlate this multitude of data** to the identification of employment opportunities by **creating a practicable and user-friendly method**.

Research/Action Methodology

This **Sector Studies Research Report is not a purely compilatory study; it is a Research/Action**, meaning it will undergo further implementation. It is a **continuously updated document** resulting from experimentation with users and companies involved in the AMIL Project.

While it is **centred on the Italian case** and specifically functional to the AMIL Project located in the **Lazio Region**, the methodology used is **transferable and adaptable** across all member countries. For this reason, the report explains its sources in the spirit of sharing with project partners and facilitating adaptability to different territorial contexts. The work carried out so far has entailed:

- a) Identifying and studying the Sources;
- b) Constructing a method for identifying employment needs;
- c) Identifying attractive sectors;
- d) Studying the identified sectors and related production areas of interest;
- e) Identifying vacancies for each production area selected.

The Functional Flow

The proposed method is based on the consistent sequencing of the following actions:

- **Identify general labour market issues** within the context of the reference territory and sectors of interest.
- **Identify the specific sectors of interest.** This in-depth report focuses on **Construction, Large-scale Distribution, and Services to Businesses and People**, based on data collected so far from direct beneficiaries during the guidance phase and local employment scouting activity.
- **Identify professions in demand.**
- **Select professions of specific interest.**
- **Analyse sectors, employment needs, and vacancies by Sector/Territory**, including the identification and explanation of the methodology and tools used.
- **Identify the specific skills required** for each selected profession.
- **Implement the necessary training courses** related to the required skills.

In line with the research/action logic, the method is currently being used with project beneficiaries, **directly involving operators in the experimentation** and thereby continuously enhancing the report's content.

Italian Labour Market and European Context

Key Macroeconomic Data

The overall picture for Italy, as highlighted by various national and European research institutions, indicates a **growing employment trend for 2023**, in line with other European countries. However, it presents specific challenges, such as **productivity and a reduction in the workforce (600,000 people)**. This reduction is partly caused by the failure to replace retirees with new generations, and also by the **emigration of young, generally qualified adults**.

Another critical factor is the **underemployment of women**, whose rate remains consistently among the lowest in Europe. As a study by the Chamber of Deputies' centre points out: "In the European context, the female employment rate in Italy turns out to be—according to data relating to the fourth quarter of 2022—the **lowest among the states of the European Union, being about 14 percentage points below the EU average...** In addition, **one in five women leaves the labour market as a result of maternity.**"

Focus on the Lazio Region

The Bank of Italy's Annual Report on regional economies (2024, based on 2023 data) illustrates that the Lazio labour market recorded an **increase in employment for the third consecutive year, exceeding the pre-pandemic level: growth was 2.3 per cent**, slightly higher than the national average. The employment rate for the 15–64 age group rose from 61.8% to 63.2%, remaining higher than the Italian average.

Significantly for AMIL's purposes, the increase in employment primarily affected the **15-34 age group, with increases of 5%**, and the most involved sectors were **services and, to a lesser extent, construction**. This increase was primarily driven by **fixed-term employment contracts**, contrasting with the national trend where the stable component contributed more significantly.

The Report highlights that the employment growth in Lazio is **attributable to the almost total contribution of foreign workers**. While the foreign component of employment in Lazio decreased slightly (-1.1 per cent) in 2023, it still represented about **12% of total employed workers** (Eurostat data).

Demographic decline affects the future labour supply and the progressive ageing of the population. At the beginning of 2023, Lazio's population was 5.7 million, 11.1% of whom were foreign, a share higher than the Italian average (8.7%). The population increase is due to the **foreign migration balance** and movement from other regions, as the natural balance is negative.

Labour Market Demand and Shortages

A widespread complaint from the business world concerns the **difficulty in finding a new workforce** due to multiple factors, including the mismatch between business needs and candidate skills.

The **EURES Country Factsheet** (2023 Labour Shortages and Surpluses Report) notes that among the **top 30 hardest-to-fill occupations** in 2023, **12 belong to craft workers** sought mainly in the **construction** sector (e.g., welders, plasterers, plumbers) and the **industrial** sector (e.g., mechanics, maintenance workers). The report also highlights a significant misalignment regarding work permits for Third-Country Nationals under the *flows decree*: company requests are **4.4 times greater than the available permits**. Eligible professions for entry include electricians, plumbers, bus drivers, and family care and social-health workers.

The **construction sector** continues to grow in 2023, and although it's slowing down, it is particularly affected by the green transition. Construction has above-average values for applications requiring green skills, with **recruitment difficulties evident for 53.9% of them**.

However, employment prospects up to 2027 show a shift towards **highly qualified levels for managerial, professional, and technical positions, accounting for 40% of vacancy forecasts**. Estimated needs for skilled labour and plant operators are close to 17% of the total.

CEDEFOP's study (2023) predicts rapid expansion in Italy, especially in two sectors: **hospitality and catering** and the **social and health sector**. The Manpower Group's survey on talent shortages highlights that **IT skills are predominantly lacking**.

Most In-Demand Professions in Lazio (Excelsior 2023)

Excelsior's Annual Bulletin for 2023 lists the most in-demand professions in the region, along with the percentage indicating the difficulty in finding them:

Profession	Expected Entries	Difficulty in Recruitment (%)
Operators and employees in catering activities	70,920	51%
Unqualified personnel in cleaning services	60,620	29%
Sales Associates	47,670	29%
Unqualified personnel moving and delivering goods	27,790	25%
Secretarial and general affairs employees	27,470	25%
Drivers of motor and animal-drawn vehicles	25,980	51%

Sectors Expecting the Greatest Number of Employees (Absolute Values)

1. **Accommodation and food services; Tourist services** (92,440)
2. **Operational support services for businesses and people** (72,890)
3. Retail, wholesale and repair of motor vehicles and motorcycles (69,230)
4. **Construction** (56,960)
5. Transport, logistics and warehousing services (45,140)

Detailed Professional Specificity Analysis (Selection)

The analysis focuses on selected professions in the Construction, Retail, and Care Services sectors, relevant to the target audience of TCNs.

Construction Sector

This sector is strategically important, with a high reliance on immigrant labour, covering an average of **22.2% of new contracts**.

Profession	Expected Revenue	Difficulty in Finding (V.A.)	Difficulty of Finding (%)
6121 - Stone, brick, refractory masons	21,240	12,250	58%
6137 - Electricians in civil construction	7,990	5,550	69%
7441 - Earthmoving machinery operators	1,790	1,250	70%

Profession	Expected Revenue	Difficulty in Finding (V.A.)	Difficulty of Finding (%)
6136 - Plumbers and plumbing/gas pipe layers	1,620	930	57%
7423 - Truck and truck drivers	1,610	790	49%
6233 - Industrial machinery mechanics and fitters	1,570	1,320	84%
8421 - Labourers and unskilled civil construction personnel	1,290	520	40%

Key Characteristics (for selected professions):

- **Gender:** High male presence.
- **Youth Hiring:** Low (less than 40% for all considered professions).
- **Prerequisite:** Work experience in the same sector is generally preferred (except for unskilled workers).
- **Difficulty/Obstruction:** All considered skilled professions have a difficulty rate over 50% (unskilled is 40%). Main obstructive factors are the **lack of candidates and lack of preparation**.
- **Training:** Vocational training is the preferred path (compulsory schooling for unskilled labourers/drivers).
- **Upskilling Need:** **Very high need for further company-funded training** (never less than 80%).

Retail Sector

Profession	Expected Revenue	Difficulty in Finding (V.A.)	Difficulty of Finding (%)
5122 - Retail salespeople	33,430	9,050	27%
8132 - Unskilled packaging and warehouse personnel	3,840	1,300	34%
3334 - Sales and distribution technicians	950	420	44%
7423 - Truck and truck drivers	330	280	85%

Key Characteristics:

- **Gender:** Accessible equally to males and females (except for heavy vehicle drivers).

- **Youth Hiring:** Sales assistants and packaging workers have a young person recruitment rate over 40%.
- **Immigrant Workers:** Rate is generally **less than 20%** (highest for heavy vehicle drivers at 23.8%, lowest for sales technicians at 2.2%).
- **Difficulty/Obstruction:** Recruitment difficulty is moderate (Sales: 27%, Packaging: 34%) but high for technicians and drivers. The main obstacle is the **lack of candidates**.
- **Upskilling Need:** **High need for further company-funded training** for all considered professions.

Care Services Sector

This sector is critical, with a large, often informal, component.

Profession	Expected Revenue	Difficulty in Finding (V.A.)	Difficulty of Finding (%)
5311 - Skilled occupations in health and social services	7,640	3,350	44%
5523 - Personal assistance workers	4,910	1,600	33%
8143 - Unqualified personnel in cleaning services	850	90	11%
3452 - Reintegration and social integration technicians	660	210	32%
5522 - Child supervisors	390	10	3%

Key Characteristics:

- **Gender:** **Mainly female-driven**, with minimum rates of exclusively male presence.
- **Youth Hiring:** **Very low** (average 15%).
- **Prerequisite:** Work experience in the same sector is privileged for all considered professions.
- **Immigrant Workers:** **Volatile rate**, with the **highest peak for personal assistance workers (44.6%)** and the lowest for child surveillance workers (2.7%).
- **Upskilling Need:** **High need for further company-funded training** for all considered professions.

Conclusion on Mismatch and Training

The detailed analysis highlights a consistent and profound **mismatch** between the skills required by the market and those available in the Lazio region.

- **High Replacement Demand:** The need for further company-funded training is **extremely high** (80%) across nearly all analysed professions, even in those typically considered low-skilled (e.g., bricklayers). This reinforces the evidence of the **skill gap**.
- **Experience vs. Youth:** The consistently **low rate of young people hired** suggests that even in manual roles, experience is highly valued, reinforcing the need for targeted vocational training that is immediately applicable.
- **TCN Opportunity:** The **high immigrant worker rates** in sectors like **Personal Assistance (44.6%)** and the high demand/difficulty rates in **Construction** suggest that these sectors represent clear, data-driven opportunities for TCN integration, provided the necessary linguistic and specific vocational training is in place.

The defined functional sequence, which integrates data from the **Excelsior System (Demand/Difficulty)**, the **Atlas of Work (Skills Taxonomy)**, and **LMI (Operational Alignment)**, serves as the necessary, structured methodology to bridge this gap and make the job placement process for TCNs more efficient and evidence-based.