



CEPIS
Council of European Professional
Informatics Societies

- A federation of 36 European Computer Professional Bodies
- C. 400000 Individual Members
- 33 Countries within Council of Europe
- Founded with CEC support in 1988/89
- Created ECDL / EUCIP

www.cepis.org



**THINKING AHEAD ON e-SKILLS FOR
THE ICT INDUSTRY IN EUROPE**
Harnessing our Strengths and Diversity for the World Stage
February 2007

N.G. McMullen – CEPIS President



BACKGROUND

- Consortium of CEPIS, University of Manchester, Eurochambres
- Project Sponsored by DG Enterprise and Industry
- 12 Month duration
- Extensive Consultation with ICT Industry and European ICT Organisations (public / private)
- Key Element of CEPIS e-Skills strategy
- Key Element of the Long Term European e-Skills strategy



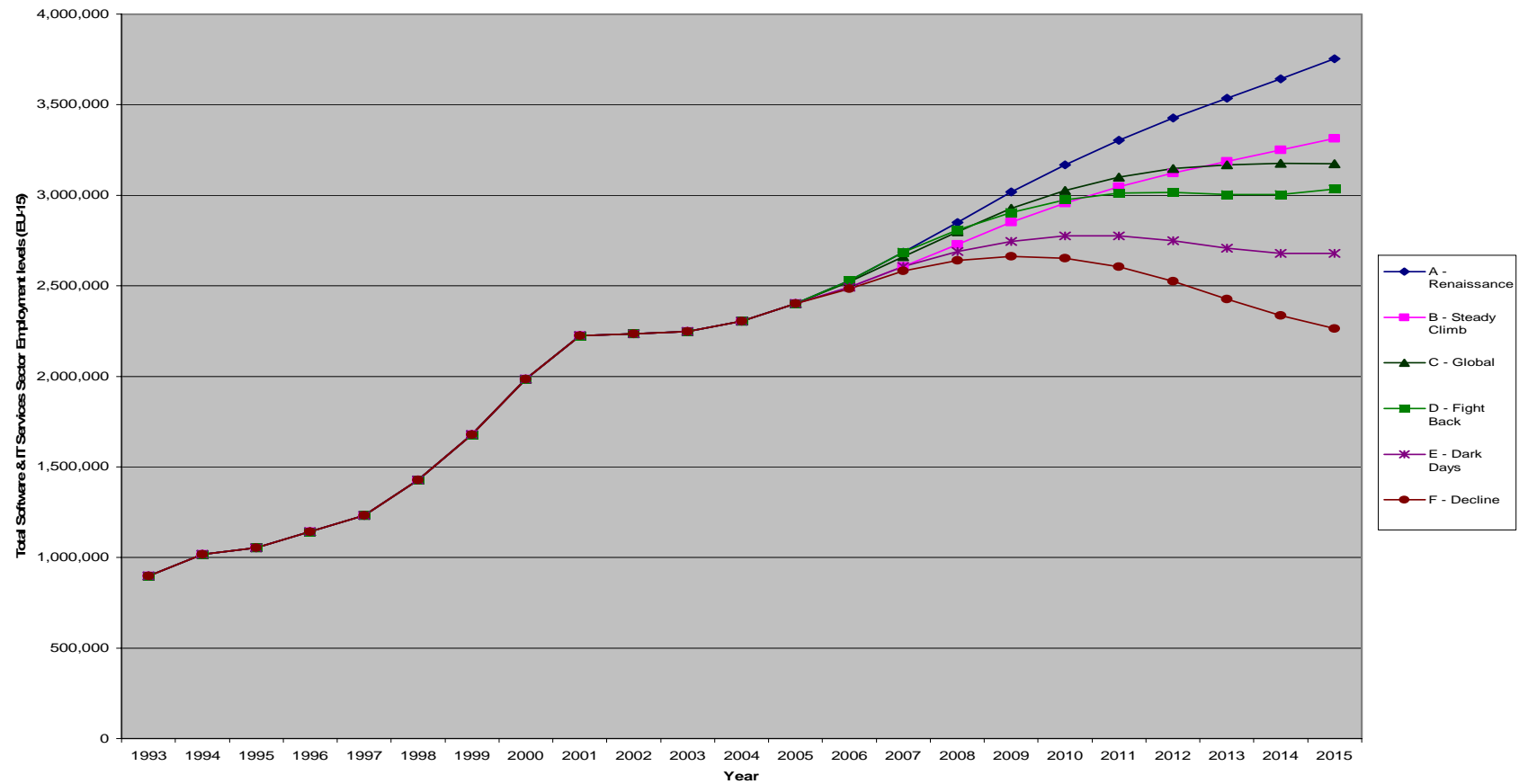
CORE ELEMENTS

- Development of 6 varying ICT industry scenarios covering a wide range of labour market possibilities
- Development of a robust economical / mathematical model for projecting supply and demand of e-Skills in Europe under different market conditions
- A detailed and considered analysis of labour market data for the ICT Industry
- A detailed analysis of the scope of IT Practitioner skills
- Provision of a basis from which to develop in greater detail, both quantitative and qualitative perspectives, ICT Market Scenarios which should actively engage Industry, Academia and Policy Makers
- A considered review of the impact of Offshoring on the European labour market for IT practitioners



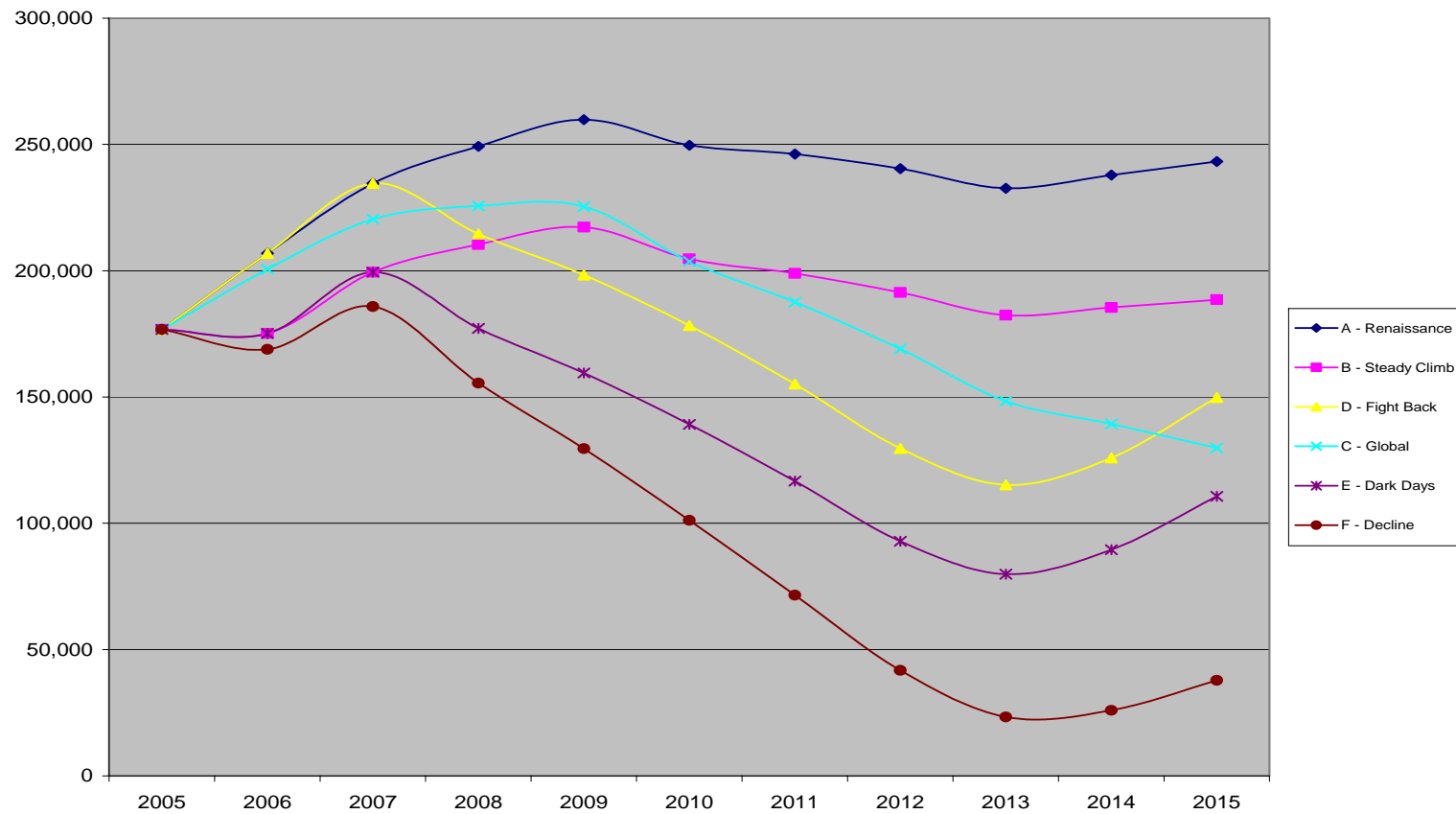
RESULTS – Potential Demand Trajectories

Employment in EU-15 Software & IT Services Sector under the six Scenarios





RESULTS – Potential Supply Trajectories



23rd March 2007

Confindustria Servizi
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CONCLUSIONS

1. 90 Potential 'drivers' may influence the Supply and Demand for e-Skills in Europe
2. The Core Drivers can be condensed to the
 1. *rate of ICT innovation,*
 2. *economic climate,*
 3. *pace of off-shoring,*
3. Through Scenario Development, future supply and demand of e-Skills can be modelled and analysed from a quantitative and qualitative perspective
4. Based on these Scenarios, projections can be made on supply and demand for e-Skills in the EU in 2010 / 2015 under a range of labour market conditions
5. Under the various conditions in each Scenario, varying shortfalls in IT Practitioners in the EU can be forecast
6. The mismatch between Supply and Demand varies depending on ICT Market scenario.
7. The Impact of ICT Offshoring will vary with each Scenario and require an appropriate public policy approach at national / European level



RECOMMENDATIONS

1. Development of Scenario Planning as an ongoing process
2. Greater understanding / awareness of impact of growth & globalisation of IT Industry
3. Serious Collaboration between Industry and Policy makers on the impact of changing ICT cycles
4. Improve existing EU Data Collection and benchmarking in the area of e-Skills across Europe
5. Promote an improved understanding amongst Industry / Public Policy of quantitative status of e-Skills in Europe
6. Close examination of the 'quality' aspects of the skills shortage
7. Develop innovative ways of addressing Industry- University mismatches
8. Joint actions to create positive publicity around IT Professions