



## Flash Eurobarometer 529

# European Year of Skills: Skills shortages, recruitment and retention strategies in small and medium-sized enterprises

Report



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Survey requested by the European Commission, Directorate-General for Employment, Social Affairs and Inclusion and coordinated by the Directorate-General for Communication

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Flash Eurobarometer 529 – Ipsos European Public Affairs





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## Introduction

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SMEs are currently facing structural difficulties in recruiting staff with the right skills. **Skills mismatches and shortages are identified as one of the main challenges that the European Union is currently facing.** There is a need to improve the supply and increase the take-up of education and training in areas linked to skills needs to overcome labour shortages, particularly in light of the digital and green transitions.

Having a workforce with the skills that are in demand contributes to sustainable growth, leads to more innovation and improves companies' competitiveness. The **European Year of Skills 2023** promotes a mindset of lifelong reskilling and upskilling. This is essential to help people develop the right skills for quality jobs and help companies, in particular small and medium enterprises (SMEs), to address labour shortages in the EU.

The **aim of this Flash Eurobarometer** is to measure **skills shortages in SMEs and provide insights in SMEs' recruitment and retention strategies.** In detail, the survey covers the following:

- Importance of skills for SMEs' business model
- SMEs' experiences with finding and retaining workers with the rights skills
- Skills shortages for specific job roles
- Impact of skills shortages of SMEs' activities
- SMEs' recruitment and retention strategies
- SMEs' views on employee training
- Recruiting staff from outside the EU.

On behalf of the European Commission, Directorate-General for Employment, Social Affairs and Inclusion, Ipsos European Public Affairs interviewed a representative sample of SMEs in each of the 27 Member States of the European Union. Between 4 and 24 May 2023, 12 909 interviews were conducted over the telephone. Survey data are weighted to marginal population distributions (in terms of number of employees and NACE sector using rim weighting). The EU27 averages are weighted according to the size of the business population of each country. A technical note on the methods applied to conduct the survey is provided as an annex to this report.

*Notes:*

- 1) Survey results are subject to sampling tolerances meaning that not all apparent differences between groups may be statistically significant. Thus, only differences that are statistically significant (at the 5% level) – i.e. where it can be reasonably certain that they are unlikely to have occurred by chance – are highlighted in the text.
- 2) Percentages may not add up to 100%, as they are rounded to the nearest percent. Due to rounding, it may also happen that the percentages for separate response options shown in the charts do not exactly add up to the totals shown in charts and tables or mentioned in the text. Response percentages will exceed 100% if the question allowed respondents to select multiple responses.
- 3) In this report, countries are referred to by their official abbreviation. The abbreviations used in this report correspond to:

BE		Belgium	LT		Lithuania
BG		Bulgaria	LU		Luxembourg
CZ		Czechia	HU		Hungary
DK		Denmark	MT		Malta
DE		Germany	NL		Netherlands
EE		Estonia	AT		Austria
IE		Ireland	PL		Poland
EL		Greece	PT		Portugal
ES		Spain	RO		Romania
FR		France	SI		Slovenia
HR		Croatia	SK		Slovakia
IT		Italy	FI		Finland
CY		Rep. of Cyprus*	SE		Sweden
LV		Latvia			

\* Cyprus as a whole is one of the 27 EU MS. However, the 'acquis communautaire' has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category.

## Key findings

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### Importance of skills for SMEs' business model

- On average, across the EU, **82% of SMEs reply that having workers with the right skills is 'very important' for their business model and 13% say this is 'moderately important'**. This view is shared by a vast majority of respondents across all Member States.
- When asked about the **type of skills that are becoming more or less important for their SME**, about two-thirds of respondents reply that **'soft skills'** – e.g. flexibility, team work, communication and critical thinking – are becoming 'somewhat more important' (20%) or 'much more important' (48%) for their SME. 'Soft skills' are followed by **'digital skills'** – i.e. skills required for adopting and/or using digital technologies: 24% say these skills are becoming 'somewhat more important' and 38% 'much more important'.
- On average, across the EU, **29% of SMEs reply that, when recruiting workers in their company, educational qualifications (degrees, diplomas and certificates acquired) are 'very important' and 37% that these are 'moderately important'**.

### Skills shortages, recruitment and retention

- **A slim majority of SMEs (52%) say it is 'very difficult' to find workers with the right skills and about a quarter (26%) say this is 'moderately difficult'**. Across a majority of the Member States, at least three-quarters of SMEs reply that it is 'very' or 'moderately' difficult to find workers with the right skills, with SMEs in Austria (88%), Croatia (89%) and Slovakia (90%) being overall the most likely to find this difficult.
- SMEs are **divided in their views whether it is difficult to retain skilled workers**: about one in two reply this is 'very' (21%) or 'moderately difficult' (31%), compared to more than four in ten who say this is only 'slightly difficult' (17%) or 'not at all difficult' (27%). SMEs in Slovakia are overall the most likely to state that it is 'very' or 'moderately' difficult to retain skilled workers (77%). Slovakia is followed by Croatia (67%), and Czechia, Hungary and Italy (all 63%).
- Respondents were presented with **five job roles, from managers to manual labourers**. For each job role present in their SME, they were asked if their SME faces difficulties in recruiting staff.
- **Across a vast majority of SMEs surveyed, at least one of the job roles listed in the survey is present in the SME**. More specifically, 20% of respondents reply that all five job roles are present in their SME, another 20% mention four job roles, 23% three job roles and 20% two job roles. Finally, 13% of respondents reply that just one of the five job roles is present in their SME.
- Of the SMEs surveyed across the EU that indicated that at least one of the job roles is present in their SME, **74% report that they face skills shortages (i.e. applicants not**

**having the right skills or there being few/no applicants) for at least one of these job roles.** This figure ranges from 54% in Cyprus, and 56% in Sweden and Denmark to 87% in Malta and 88% in Austria.

- The results for each of the job roles separately show that the largest share of SMEs are **facing skills shortages** hiring professionals, associate professionals and technicians and the smallest share say this about hiring managers. The importance of the various job roles, however, varies across SMEs. **Excluding those SMEs who report that a certain job role does not exist in their SME**, a different ranking of job roles appears. **Machine operators, craft and skilled trades workers rank highest as being difficult to recruit** (22% 'yes, because applicants do not have the right qualifications' and 39% 'yes, because there are few or no applicants'). For **managers, and administrative, clerical and service workers**, these figures are a lot lower and **a majority of SMEs report not facing any difficulties in hiring these roles** (56% for managers and 65% for administrative, clerical and service workers).
- About a quarters of SMEs (26%) 'totally agree' and close to four in ten (37%) 'somewhat agree' that **skills shortages hold them back in general business activities**. In total, in seven Member States, at least seven in ten SMEs agree that skills shortages are affecting their general business activities; this applies to Bulgaria (79%), Romania (78%), Belgium (75%), Greece (74%), Hungary (73%), and Croatia and France (both 70%).
- Smaller proportions agree that skills shortages hold their company back in **adopting and/or using digital technologies** (16% 'totally agree' and 29% 'somewhat agree') or in **greening their business activities** (12% 'totally agree' and 27% 'somewhat agree').

## Tackling skill challenges

- When asked about the **actions they take when faced with skills shortages**, **43% of SMEs reply that they make better use of talent within the company**. This action is **followed by investing more in training (selected by 35% of SMEs) and increasing job attractiveness in terms of financial and/or non-financial benefits (32%)**. More than a quarter of SMEs (27%) say they collaborate with organisations in education or employment, or with associate or sectoral bodies, to deal with skills shortages. A similar proportion (26%) invest more in candidate searches, while 17% mention that they adjust (or lower) hiring standards. Finally, 23% of SMEs reply that they change work processes (i.e. automate, outsource, etc.) and 9% say they abandon the activity facing skills shortages.
- When asked about **measures that could help their company make recruiting staff with the required skills easier**, about three in ten respondents (31%) reply that **better collaboration with public employment services** would help their company 'a lot'; another quarter (26%) answer that this would help 'moderately'. Across all but one of the Member States, the largest (or joint-largest) share of SMEs reply that better collaboration with public employment services would at least moderately help their SME in making recruiting staff with the required skills easier; this figure varies between 35% in Latvia and 75% in Greece.

- Nearly half of respondents think that **better tools for assessing the skills of job applicants** would at least help moderately in making recruiting staff with the required skills easier (19% 'would help a lot' and 29% 'would help moderately') and a similar share say this about **better tools for assessing their company's skills needs** (18% 'would help a lot' and 29% 'would help moderately').
- In line with the EU average results, across most Member States, smaller shares of respondents answer that **measures related to hiring workers from abroad or living abroad** would at least moderately help their SME in making recruiting staff with the required skills easier.
- The majority view among SMEs across the EU is that local or regional, national and EU level organisations and authorities are **not making very much effort, or no effort at all, to support SMEs to tackle skills challenges**. For example, one third of respondents reply that national level organisations and authorities are not very much making efforts to support SMEs like their and close to four in ten (37%) believe that no efforts at all are made by national level organisations and authorities.
- **Familiarity with various EU programmes and initiatives related to skills is low** – just a handful of SMEs report being 'very familiar' with EU funding programmes for skills (5%), EU policy initiatives for skills (3%) or EU initiatives facilitating hiring skilled workers from abroad. The proportion saying they are **'not at all familiar'** is 54% for EU funding programmes for skills, 65% for EU policy initiatives for skills and 70% for EU initiatives facilitating hiring skilled workers from abroad.

## Employee training

- **The largest share of SMEs say they find it 'very' (24%) or 'moderately difficult' (26%) to find time for their staff to participate in training.** The total proportion of 'very' and 'moderately difficult' responses for this statement varies between 28% in Denmark and 68% in Croatia.
- Smaller shares of SMEs find it difficult to **identify appropriate training opportunities for their staff** (9% 'very difficult' and 27% 'moderately difficult'), **finance staff training** (13% 'very difficult' and 23% 'moderately difficult') and **assess training needs of their staff** (7% 'very difficult' and 26% 'moderately difficult').
- **One in two SMEs across the EU (50%) reply that companies should be responsible for covering the costs of job-related staff training, compared to 42% who state that companies and workers should share the costs of job-related training.** Just 5% of SMEs share the view that workers themselves should be the ones responsible for covering the costs of job-related training. There is a **large variation across Member States** in SMEs' views about who should be responsible for covering the costs of job-related staff training.

## Hiring staff from outside the EU

- On average, across the EU, 10% of SMEs report having **recently recruited someone from outside the EU** (i.e. not a national nor a resident in any of the EU Member States) to come **to work in-person within the EU** and 2% that they have recently recruited staff from outside the EU, both to come work in-person within the EU and **for working remotely from outside the EU**. Another small share (2%) reply that they have recently recruited someone from outside the EU, but only for working remotely from outside the EU.
- In Portugal and Ireland, a quarter of SMEs report having recently recruited someone from outside the EU to come to work in-person within the EU; this figure is also somewhat higher in Malta (16%) and the Netherlands (19%).. A handful of respondents in Ireland (5%), Malta (3%), the Netherlands (3%) and Poland (3%) have recently hired someone working remotely from outside the EU. In five Member States, about one in 20 SMEs have hired someone from outside the EU to work in-person in the EU and someone working remotely from outside the EU: Malta, Austria, Slovenia, Germany and Poland.
- Of those SMEs that have recently recruited someone from outside the EU, **20% describe the hiring process of this recent recruit (or of these recent recruits) as 'very difficult' and 32% as 'moderately difficult'** – compared to compared to 17% who say the process (or processes) has been 'slightly difficult' and 26% 'not difficult at all'.
- The **most-mentioned reason for not having recently recruited anyone from outside the EU** is simply that **the SME did not recruit anyone recently** (37%). Another frequently mentioned reason, however, is **no experience with hiring from outside the EU** (25%). These reasons are followed closely by 'due to specific language skills required' (25%), 'a sufficient number of candidates available within the EU' (22%), 'no appropriate candidates from outside the EU' (18%) and 'due to the expected complexity (length, cost, uncertainty etc.) of international recruitment and migration procedures' (17%).

## Section 1. Importance of skills for SMEs' business model

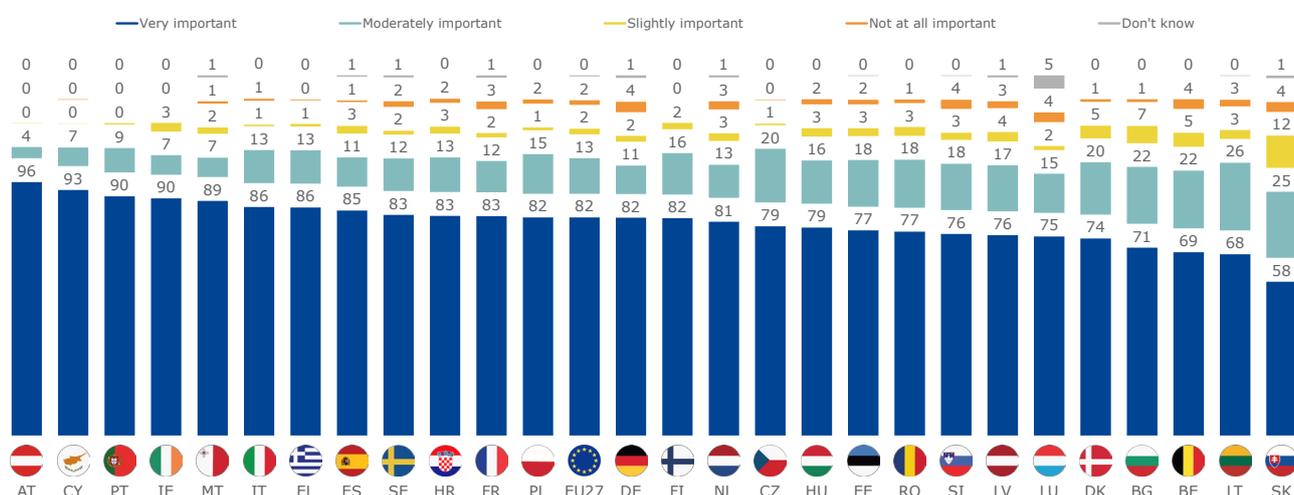
This chapter looks at SMEs' views on the importance of having workers with the right skills for an SME's business model, the importance of various types of skills – e.g. 'soft skills' and 'digital skills' – and of education qualifications.

### 1.1. Importance of having workers with the right skills

On average, across the EU, **82% of SMEs reply that having workers with the right skills is 'very important' for their business model and 13% say this is 'moderately important'**. The view that having workers with the right skills is 'very important' is shared by about eight in ten – or more – of respondents across all types of SMEs, from 79% of SMEs active in manufacturing or retail to 84% of those in the industry sector, or from 80% of SMEs with up to €100 000 in annual turnover to 85% of those with a turnover of more than €2 000 000.

**Across all Member States**, a vast majority of respondents reply that having workers with the right skills is at least moderately important for the business model of their SME. More variation is seen in the proportion saying this is 'very important' for their business model – from 58% in Slovakia to 96% in Austria.

**DX1** How important is it for the business model of your company to have workers with the right skills? (% by country)

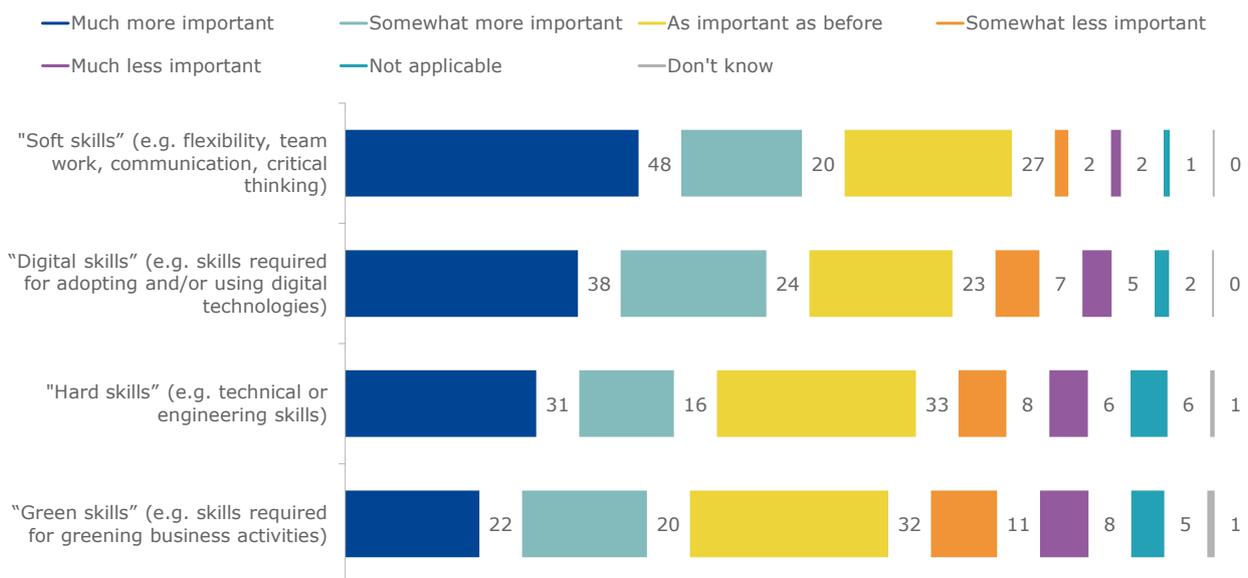


Base: all SMEs (n=12 909)

## 1.2. Importance of various types of skills

When asked about the **type of skills that are becoming more or less important for their SME**, about two-thirds of respondents reply that **'soft skills'** – e.g. flexibility, team work, communication and critical thinking – are becoming 'somewhat more important' (20%) or 'much more important' (48%) for their SME. 'Soft skills' are followed by **'digital skills'** – i.e. skills required for adopting and/or using digital technologies: 24% of respondents say these skills are becoming 'somewhat more important' in their SME and 38% that these are becoming 'much more important'. By comparison, just over four in ten respondents say the same about 'green skills' – i.e. skills required for greening business activities (20% 'somewhat more important' and 22% 'much more important' responses). The chart below also shows that **for all types of skills, less than one in five respondents reply that these are becoming 'somewhat' or 'much less important'** for their SME (from 4% for 'soft skills' to 19% for 'green skills').

**Q1** To what extent are the following skills becoming more or less important for your company? (% EU27)



Base: all SMEs (n=12 909)

The proportion of respondents replying that '**soft skills**' – e.g. flexibility, team work, communication and critical thinking – are becoming 'somewhat' or 'much more important' for their SME varies between 51% in Estonia and 92% in Portugal. In all but three of the Member States, the majority view is also that '**digital skills**' – i.e. skills required for adopting and/or using digital technologies – are becoming 'somewhat' or 'much more important'. Respondents in Cyprus (87%), followed by Greece (81%), are overall the most likely to share this view, while respondents in Czechia (39%), Estonia (48%) and Lithuania (50%) are the least likely to do so.

There is also a large variation across Member States in the proportion saying that '**green skills**' – i.e. skills required for greening business activities – are becoming 'somewhat' or 'much more important' for their SME. This view is shared by more than six in ten respondents in Portugal (64%) and Luxembourg (61%), but by only 13% of respondents in Czechia. There is less variation across Member States in the proportion of respondents answering that '**hard skills**' – e.g. technical or engineering skills – are becoming 'somewhat' or 'much more important' for their SME, with respondents in Denmark being the least likely to say so (29%) and those in Germany being the most likely (65%).

**Q1** To what extent are the following skills becoming more or less important for your company?  
(% **Total 'More important'**, by country)

		"Soft skills" (e.g. flexibility, team work, communication, critical thinking)	"Digital skills" (e.g. skills required for adopting and/or using digital technologies)	"Hard skills" (e.g. technical or engineering skills)	"Green skills" (e.g. skills required for greening business activities)
EU27		68	62	47	42
BE		66	59	39	40
BG		67	63	43	36
CZ		60	39	34	13
DK		68	55	29	38
DE		70	58	65	42
EE		51	48	33	31
IE		71	76	49	44
EL		68	81	61	43
ES		68	67	46	46
FR		61	60	39	49
HR		79	75	53	50
IT		69	66	49	43
CY		89	87	57	47
LV		63	55	53	33
LT		57	50	44	38
LU		78	55	54	61
HU		54	60	32	31
MT		75	62	53	51
NL		78	62	49	48
AT		81	57	51	45
PL		69	56	46	36
PT		92	74	58	64
RO		54	53	45	36
SI		75	63	49	40
SK		63	63	52	33
FI		63	65	33	42
SE		58	69	31	38

Note: The higher the proportion selecting a response, the **darker blue** the cell.

The highest-ranking response for each country shown in **orange**.

Base: all SMEs (n=12 909)

For 'soft skills', mostly minor differences are seen across different types of SMEs in the proportions saying that these skills are becoming 'somewhat' or 'much more important' for their SME. For 'green skills', it is observed that it are in particular respondents in large SMEs, with between 50 and 249 employees, that say that these skills are becoming 'somewhat' or 'much more important' for their SME (55% vs 42%-44% in smaller SMEs).

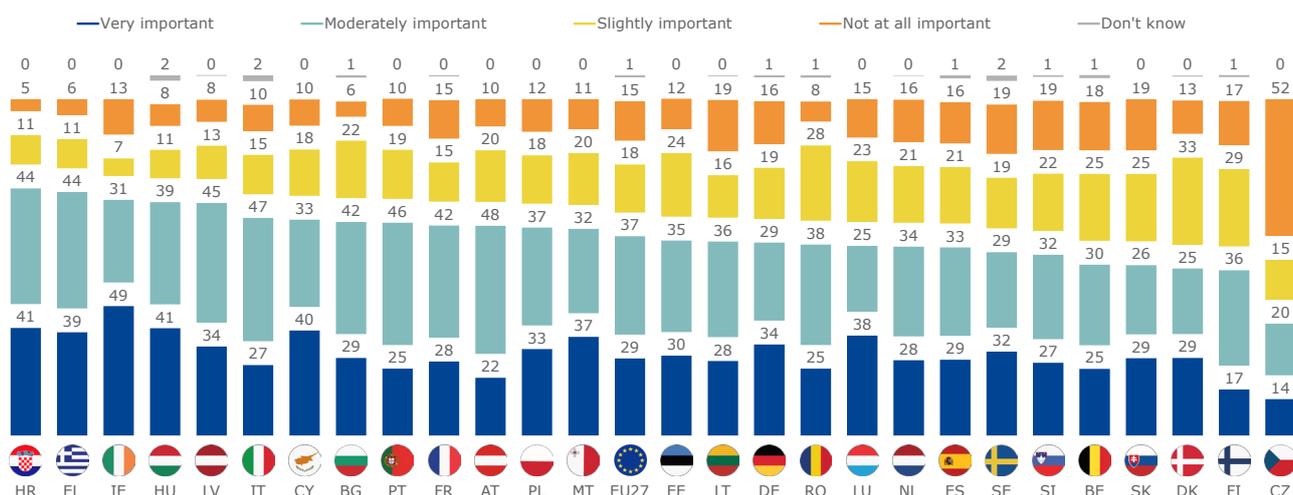
The largest differences for 'hard skills' and 'digital skills' are seen across SMEs active in different sectors. While 53% of respondents in industry and 57% of those in manufacturing reply that 'hard skills' are becoming 'somewhat' or 'much more important' for their SME, this view is shared by 45% of respondents in retail and services. Among the latter respondents, however, more than six in ten respondents (63% in retail and 64% in services) say that 'digital skills' are becoming 'somewhat' or 'much more important' for their SME; in manufacturing, this view is shared by 57% of respondents and in industry by 54%.

### 1.3. Importance of educational qualifications

On average, across the EU, **29% of SMEs reply that, when recruiting workers in their company, educational qualifications (degrees, diplomas and certificates acquired) are 'very important' and 37% that these are 'moderately important'**.

Across all but one of the **Member States**, a majority of respondents answer that, when recruiting workers in their company, educational qualifications (degrees, diplomas and certificates acquired) are 'very' or 'moderately' important. Respondents in Croatia (84%),<sup>1</sup> Greece (83%) and Ireland (80%) are overall the most likely to share this view; moreover, in these three countries (and in Cyprus), about four in ten – or more – respondents answer that educational qualifications are 'very important' (between 39% in Greece and 49% in Ireland). Czechia stands out with 52% of SMEs saying that educational qualification are 'not at all important'.<sup>2</sup>

**Q10** When recruiting workers in your company, how important are educational qualifications (degrees, diplomas, certificates acquired)? (% by country)



Base: all SMEs (n=12 909)

Educational qualifications (degrees, diplomas, certificates acquired) are more frequently said to be 'very important' by SMEs active in services (32% vs 23%-26% in the other activity sectors). Respondents in SMEs with between 50 and 249 are also more likely to state that educational qualifications are 'very' (34% vs 29%-32% in smaller SMEs) or 'moderately important' (43% vs 37%-39% in smaller SMEs).

<sup>1</sup> Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

<sup>2</sup> A closer look at the translations for this item shows that the version in Czechian refers to 'academic' qualifications vs 'educational' qualifications. This, however, can at most offer a partial explanation for the result observed in Czechia as in other countries, such as Portugal, the translation also refers to 'academic' qualifications.

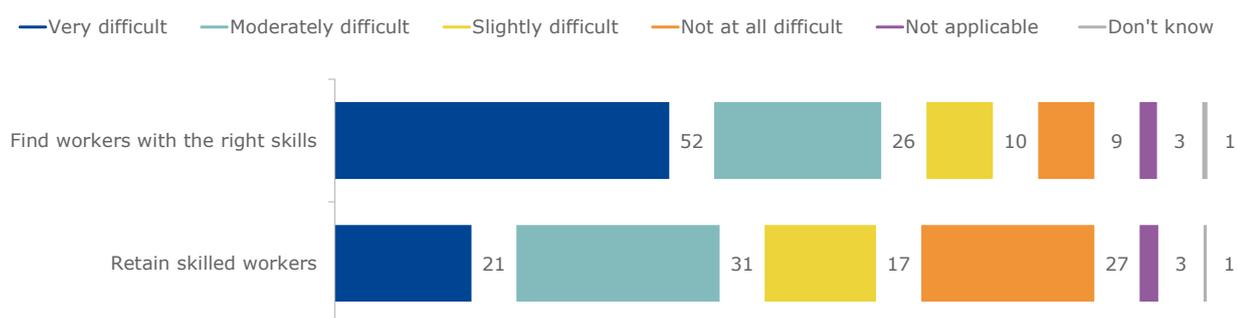
## Section 2. Skills shortages, recruitment and retention

The second chapter discusses SMEs' challenges with respect to finding workers with the right skills and retaining skilled workers – in general and for specific job roles. The chapter also looks at perceptions about impact of skills shortages on general business activities, but also on greening business activities and on adopting and/or using digital technologies.

### 2.1. Finding and retaining workers with the right skills

**More than three-quarters of SMEs say that finding workers with the right skills is 'very difficult' (52%) or 'moderately difficult' (26%).** SMEs are **divided in their views whether is also difficult to retain skilled workers**: about one in two reply this is 'very' (21%) or 'moderately difficult' (31%), compared to more than four in ten who say this is only 'slightly difficult' (17%) or 'not at all difficult' (27%).

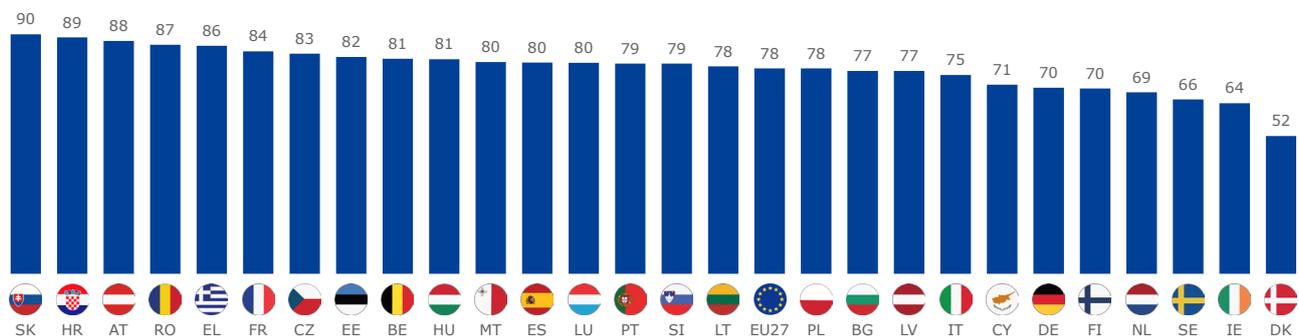
**Q2** How difficult is it for your company to: (% EU27)



Base: all SMEs (n=12 909)

Across a majority of the Member States, at least three-quarters of SMEs reply that it is 'very' or 'moderately' difficult to **find workers with the rights skills**, with SMEs in Austria (88%), Croatia (89%) and Slovakia (90%) being overall the most likely to find this difficult. In contrast, in Denmark, a slim majority (52%) say that it is difficult to find workers with the right skills. Countries close to Denmark are Ireland (64% 'very' or 'moderately difficult' responses) and Sweden (66%).

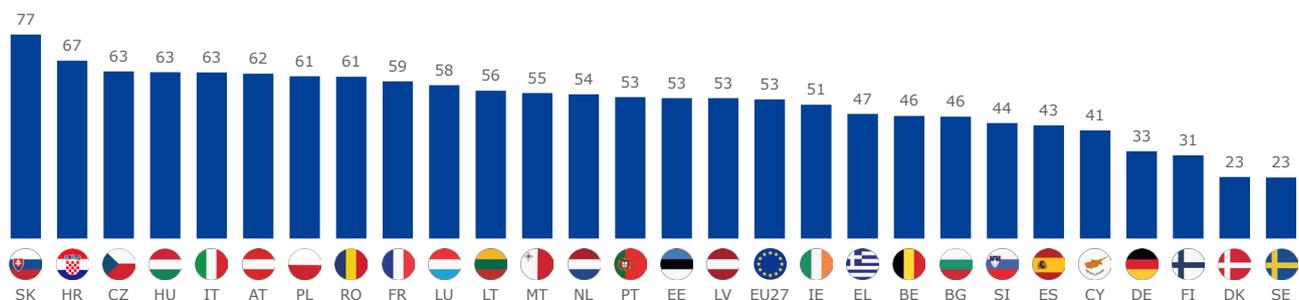
**Q2** How difficult is it for your company to: **Find workers with the right skills**  
(% 'Very' + 'Moderately difficult', by country)



Base: all SMEs (n=12 909)

SMEs in Slovakia are overall the most likely to state that it is 'very' or 'moderately' difficult to **retain skilled workers** – it was noted above that SMEs in Slovakia are also among the most likely to find it difficult to find skilled workers. Slovakia (77% 'very' or 'moderately' responses) is followed by Croatia (67%), as well as Czechia, Hungary and Italy (all 63%). At the lower end of the country ranking, not more than one in three SMEs find it difficult to retain skilled workers: 33% in Germany, 31% in Finland and 23% in Denmark and Sweden.

**Q2** How difficult is it for your company to: **Retain skills workers** (% 'Very' + 'Moderately difficult', by country)



Base: all SMEs (n=12 909)

Respondents in SMEs active in manufacturing (62%) or industry (60%) are more likely than those in SMEs active in retail (50%) or services (49%) to state that it is 'very difficult' to find workers with the right skills. In terms of company size, SMEs of medium size (10 to 49 employees or between €100 000 and €2 000 000 in annual turnover) are overall the most likely to find it 'very difficult' to find workers with the right skills. For example, this response is selected by 57% of respondents in SMEs with between 10 and 49 employees, followed by 52% in SMEs with less than ten employees and by 47% of those in SMEs with between 50 and 249 employees.

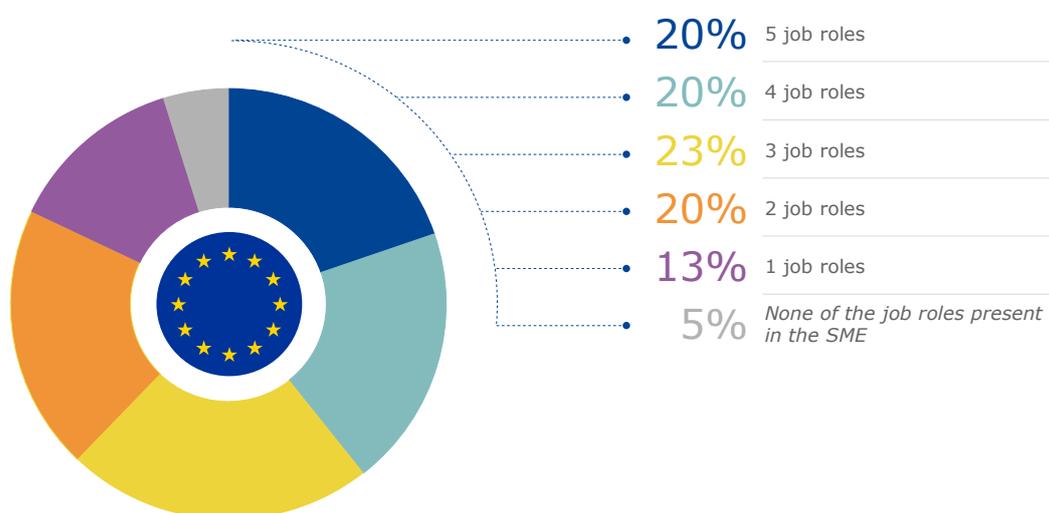
## 2.2. Skills shortages for specific job roles

Respondents were presented with five job roles, from managers to manual labourers (see footnote).<sup>3</sup> For each job role, they were asked if their SME faces difficulties in recruiting staff. Not all roles need to be present in an SME, and respondents could indicate if a specific job role is not present in their SME.

### a. Number of job roles present in SMEs

The chart below shows that, across the SMEs surveyed, 20% of respondents reply that all five job roles are present in their SME, another 20% mention four job roles, 23% three job roles and 20% two job roles. Finally, 13% of respondents reply that just one of the five job roles is present in their SME.

**Q3** Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so. (% EU27)



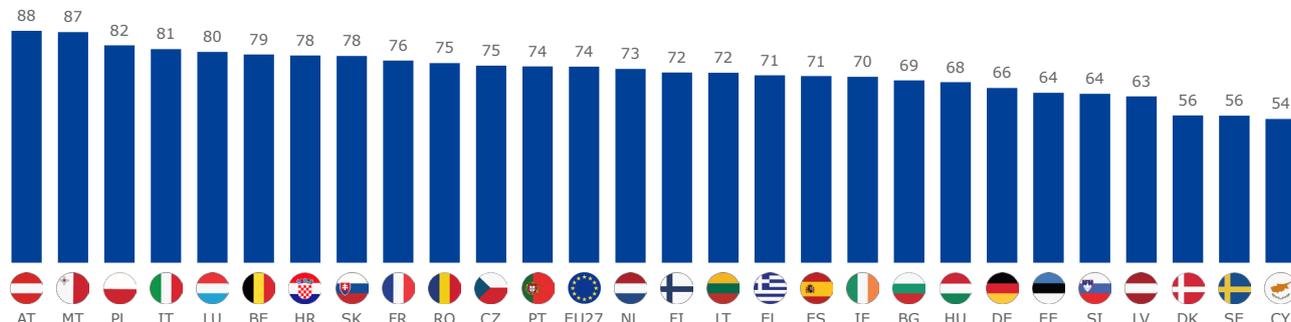
Base: all SMEs (n=12 909)

The number of different job roles present in an SME increases with size of the SME (in terms of number of employees): for example, just 19% of respondents in SMEs with less than ten employees reply that all five job roles are present in their SME; this figure increases to 43% for SMEs with

<sup>3</sup> The selection of job roles to be included in the survey has closely followed the list of job roles as determined in the International Standard Classification of Occupations (ISCO), at the highest aggregate level of the classification (i.e. corresponding to the ten “Major groups” of occupations). However, the list of occupations presented in the survey excluded two occupational groups, notably ISCO 6 – Skilled Agricultural, Forestry and Fishery workers and ISCO 0 – Armed Forces Occupations, due to the fact that organisations working in agricultural and armed forces sectors were not covered in the survey. Some of the remaining groups were further aggregated to facilitate survey operations: ISCO 2 and ISCO 3 groups were presented in the survey as a single category “Professionals, associate professionals and technicians”; ISCO 4 and ISCO 5 groups were presented in the survey as a single category “Administrative, clerical and service workers”; while ISCO 7 and ISCO 8 groups were presented in the survey as a single category “Machine operators, craft and skilled trades workers”. The job roles covered in the survey represent the majority (around 96%) of all the jobs in the EU, calculating on the basis of the annual 2022 EU Labour Force Survey data.



**Q3** Does your company face difficulties in recruiting staff for the following roles? (% by country)  
**SMEs facing skills shortages (i.e. applicants not having the right skills or few/no applicants) for at least one of the job roles present in their company**



Base: all SMEs (n=12 909)

The proportion of SMEs facing skills shortages (i.e. applicants not having the right skills or there being few/no applicants) for at least one of the job roles present in the SME is higher for SMEs with 10 or more employees (81% for SMEs with 10-49 employees and 83% for SMEs with 50-249 employees) than for SMEs with less than ten employees (74%). An even larger difference is seen by activity sector of the SME: close to 90% of SMEs in manufacturing (89%) and industry (87%) are facing skills shortages for at least one job role, while this figure is much lower in retail (74%) and, even more so, in services (69%).

**Q3** Does your company face difficulties in recruiting staff for the following roles?  
 (% by NACE and size)  
**SMEs facing skills shortages (i.e. applicants not having the right skills or few/no applicants) for at least one of the job roles present in their company**

**Company size (%)**



**NACE sector (%)**



Base: all SMEs (n=12 909)

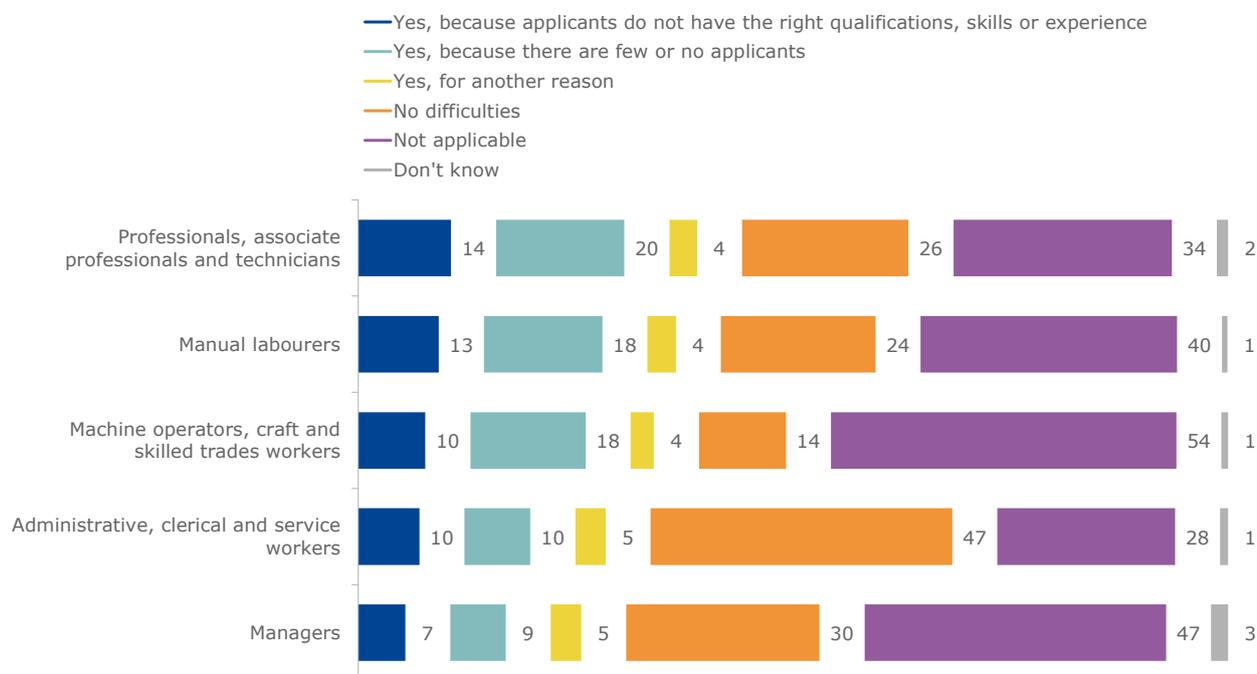
### c. Skills shortages by job role

As noted in the previous section, across most SMEs surveyed, at least one of the job roles listed in the survey is present in the SME. In the remaining paragraphs of this section, an analysis is presented for each of these job roles.

The chart below shows, first of all, that **the job role most frequently present in SMEs is administrative, clerical and service workers** (for this job role, the smallest share of respondents – 28% – reply that the job role is NOT present in their SME). The job role **least frequently present** in the SMEs surveyed is **machine operators, craft and skilled trades workers** (54% 'not applicable' responses).

Additionally, an analysis of all responses provided, **including the 'not applicable' answers**, shows that, in general, **across SMEs, professionals, associate professionals and technicians appear to be the most difficult to hire**: 14% of respondents reply that their SME is facing difficulties to recruit staff for this job role because applicants do not have the right qualifications and 20% reply that there are few or no applicants. For managers, the proportions of respondents replying that applicants do not have the right qualifications (7%) or there being few or no applicants (9%) are the lowest.

**Q3** Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so. (% EU27)

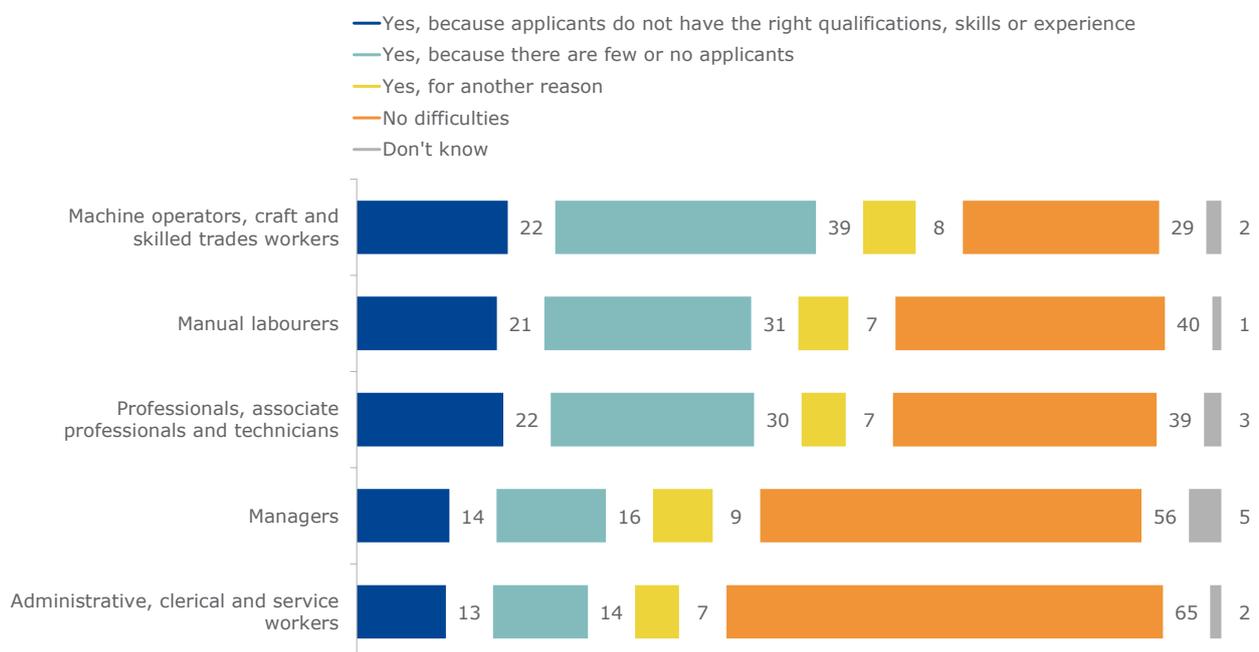


Base: all SMEs (n=12 909)

A different picture emerges when **excluding the 'not applicable' responses** from the analysis (see the chart below). In this analysis, **machine operators, craft and skilled trades workers rank highest as being difficult to recruit** (22% 'yes, because applicants do not have the right qualifications' and 39% 'yes, because there are few or no applicants'). **For managers and administrative, clerical and service workers, these figures are a lot lower** and a majority of SMEs report not facing any difficulties in hiring these roles (56% for managers and 65% for administrative, clerical and service workers).

**Q3** Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so. (% EU27)

**Results without 'not applicable' responses**



Base: Job role existing in the SMEs, excl. non-applicable responses (n= n=7 264 to n=9 994)

The results by Member State (see table on the next page) are also presented without the 'not applicable' responses. This analysis shows, first of all, that there is **a large variation across Member States** in the proportion saying that their SME faces difficulties recruiting machine operators, craft and skilled trades workers due to skills shortages: between 34% of SMEs in Slovakia and 75% in Austria reply that that applicants for these roles do not have the right qualifications or that there are few or no applicants for these roles. Secondly, **across a large majority of Member States, the proportions facing challenges in recruiting staff due to skills shortages are the highest for machine operators, craft and skilled trades workers.**

**Q3** Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

**Results without 'not applicable' responses**

(% 'Yes, because applicants do not have the right qualifications, skills or experience' + 'Yes, because there are few or no applicants', by country)

		Machine operators, craft and skilled trades workers	Professionals, associate professionals and technicians	Manual labourers	Managers	Administrative, clerical and service workers
EU27		56	52	51	30	27
BE		72	66	64	36	46
BG		68	63	47	35	32
CZ		65	64	43	26	29
DK		65	47	37	20	15
DE		71	36	36	22	28
EE		62	62	34	19	28
IE		61	49	44	31	16
EL		56	63	56	21	39
ES		66	58	55	27	20
FR		66	51	58	29	36
HR		63	62	46	45	37
IT		56	49	57	36	18
CY		71	43	46	12	22
LV		56	53	42	28	25
LT		60	63	47	44	23
LU		56	48	47	49	34
HU		61	63	52	28	24
MT		53	58	49	40	39
NL		59	42	46	37	33
AT		75	57	42	16	41
PL		59	56	58	43	32
PT		47	44	51	14	15
RO		45	68	63	36	46
SI		42	50	40	17	15
SK		34	67	59	41	28
FI		66	54	45	29	26
SE		47	39	32	27	19

Note: The higher the proportion selecting a response, the **darker blue** the cell.

The highest-ranking response for each country shown in **orange**.

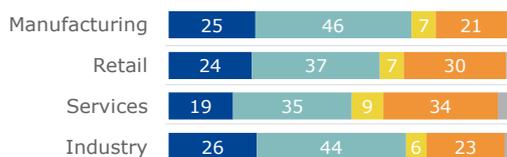
Base: Job role existing in the SMEs, excl. non-applicable responses (n= n=7 264 to n=9 994)

There are also some differences to be observed by types of SMEs. For example, professionals, associate professionals and technicians, machine operators, craft and skilled trades workers, and manual workers are job roles that are more frequently mentioned as difficult to recruit by SMEs active in manufacturing or industry. The charts below show that these differences are mainly caused by a higher share of SMEs in manufacturing or industry answering that there are *few or no applicants*, and less so due to differences in the share of SMEs replying that applicants do not have the right qualifications, skills or expertise. For example, 35% of SMEs in manufacturing or industry face difficulties recruiting professionals, associate professionals and technicians due to there being not enough applicants; this figure is 28% for SMEs in services (recruiting for that job role) and 30% for SMEs in retail.

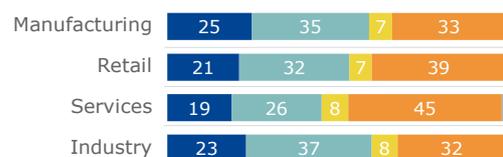
SMEs active in services or retail, on the other hand, are somewhat more likely to face difficulties in recruiting administrative, clerical and service workers.

**Q3** Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so. (% by NACE sector and size  
**Results without 'not applicable' responses**

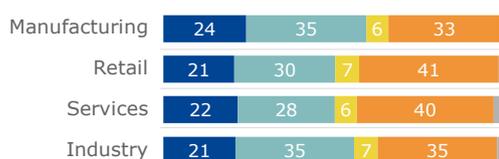
#### Machine operators, craft and skilled trades workers



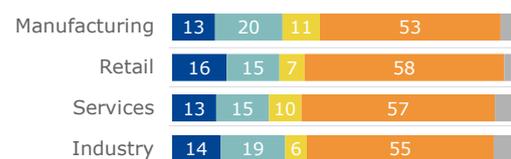
#### Manual labourers



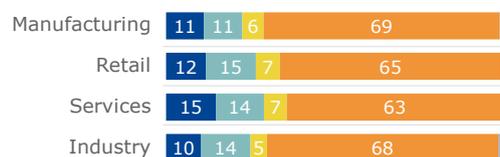
#### Professionals, associate professionals and technicians



#### Managers



#### Administrative, clerical and service workers



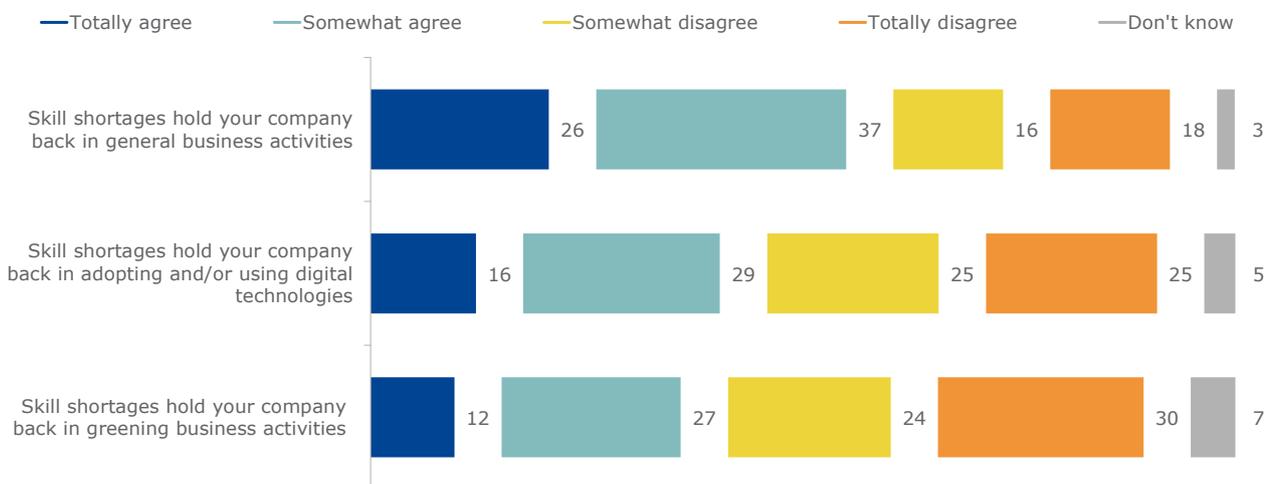
- Yes, because applicants do not have the right qualifications, skills or experience
- Yes, because there are few or no applicants
- Yes, for another reason
- No difficulties
- Don't know

Base: Job role existing in the SMEs, excl. non-applicable responses (n= n=7 264 to n=9 994)

### 2.3. Impact of skills shortages on business activities

About a quarters of SMEs (26%) 'totally agree' and close to four in ten (37%) 'somewhat agree' that **skills shortages hold them back in general business activities**. Smaller proportions agree that skills shortages hold their company back in **adopting and/or using digital technologies** (16% 'totally agree' and 29% 'somewhat agree') or in **greening their business activities** (12% 'totally agree' and 27% 'somewhat agree').

**Q4** Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? (% EU27)



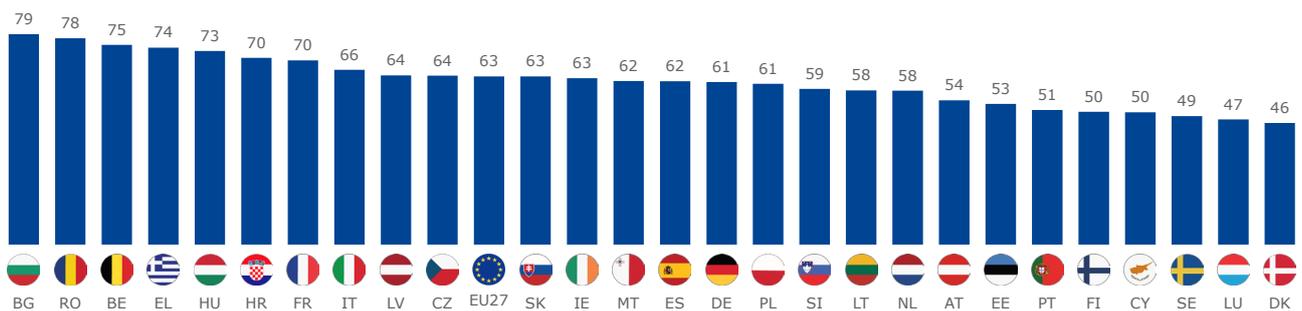
Base: all SMEs (n=12 909)

The proportion of SMEs 'strongly' or 'somewhat' agreeing that skills shortages hold their company back in **general business activities** ranges from 46% in Denmark, 47% in Luxembourg and 49% in Sweden to 78% in Romania and 79% in Bulgaria. In total, in seven Member States, at least seven in ten SMEs agree that skills shortages are affecting their general business activities; this applies to Romania and Bulgaria, but also to Belgium (75%), Greece (74%), Hungary (73%), Croatia and France (both 70%).

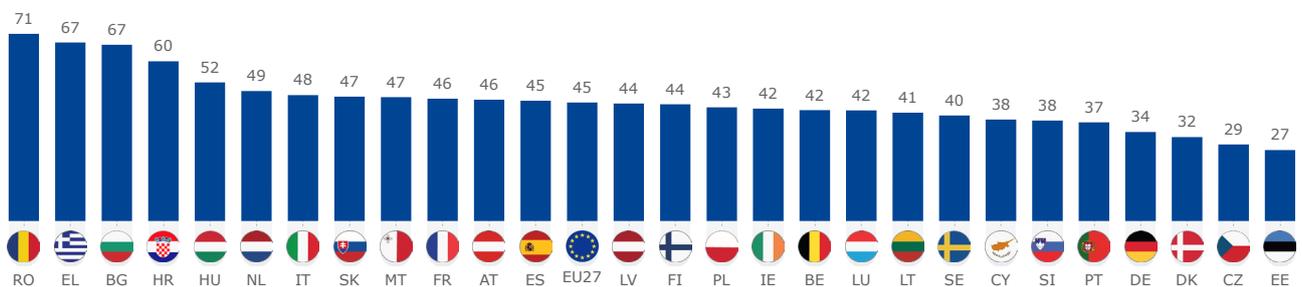
SMEs in Romania (71%), Bulgaria and Greece (both 67%) are also the most likely to 'strongly agree' or 'somewhat agree' that skills shortages hold their company back in **adopting and/or using digital technologies**. In Estonia (27%), Czechia (29%), Denmark (32%) and Germany (34%), on the other hand, only half as many SMEs agree with this statement. In a vast majority of the Member States, between four and five in ten respondents agree that skills shortages delay the adoption of digital technologies in their SME.

**Q4** Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? (% **Total 'Agree'**, by country)

#### Skills shortages hold your company back in general business activities



#### Skills shortages hold your company back in adopting and/or using digital technologies

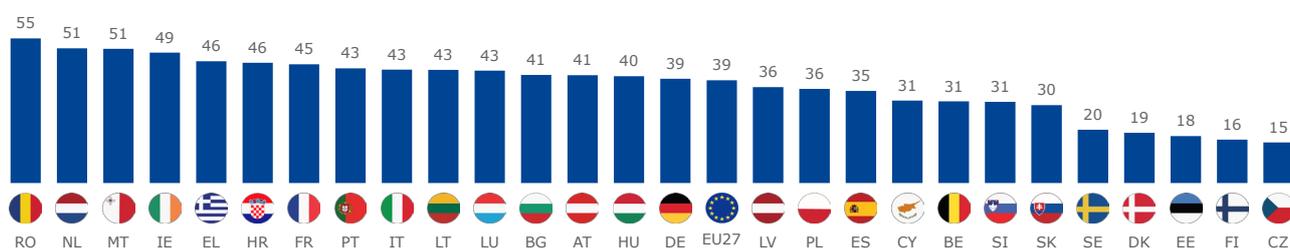


Base: all SMEs (n=12 909)

In Romania, a majority of respondents 'strongly' or 'somewhat' agree (55%) that skills shortages hold their company back in **greening business activities**; the proportion agreeing is about one in two in Ireland (49%), Malta and the Netherlands (both 51%). In five Member States, not more than one in five respondents agree that skills shortages hold their company back in greening business activities: Czechia (15%), Finland (16%), Estonia (18%), Denmark (19%) and Sweden (20%).

**Q4** Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? (% **Total 'Agree'**, by country)

### Skills shortages hold your company back in greening business activities



Base: all SMEs (n=12 909)

SMEs active in manufacturing or industry (both 67%) are more likely than their counterparts active in services (62%) or retail (65%) to 'strongly' or 'somewhat' agree that skills shortages hold their company back in general business activities. SMEs active in retail, in turn, are more likely to 'strongly' or 'somewhat' agree that skills shortages are holding their company back in greening business activities (44% vs 37%-40% in the other activity sectors). Finally, 49% of SMEs in manufacturing and 49% in retail 'strongly' or 'somewhat' agree that skills shortages hold their company back in adopting and/or using digital technologies, but the level of agreement decreases to 44% among SMEs active in services and 41% among those active in industry.

Differences for this question in terms of company size – in terms of number of employees or annual turnover – do not tend to reach statistical significance. There are two exceptions: SMEs with less than ten employees less frequently agree that skills shortages hold their company back in greening business activities (39% 'strongly' or 'somewhat' agree vs 44% in larger SMEs) and SMEs with an annual turnover of more than €2 million are more likely to agree that skills shortages hold their company back in adopting and/or using digital technologies (54% vs 43%-47% in SMEs with lower turnover values).

## Section 3. Tackling skills challenges

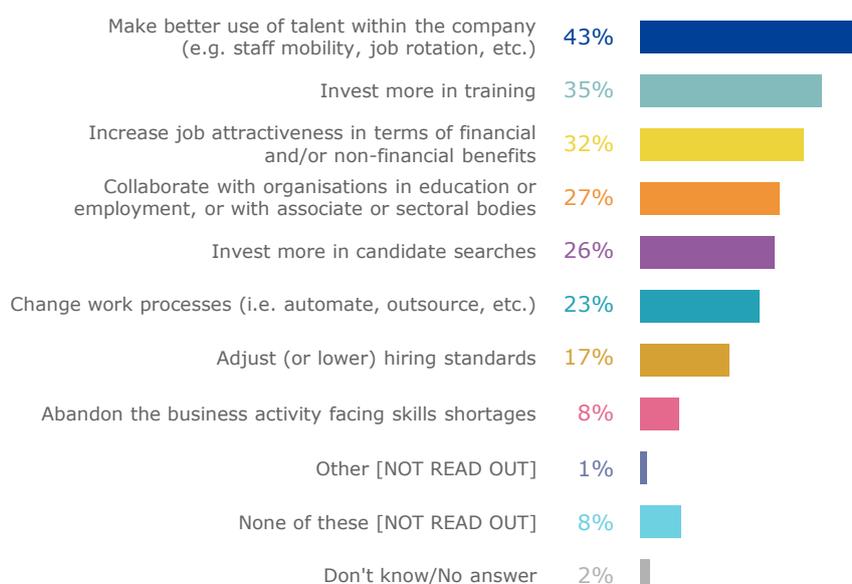
This chapter first looks at SMEs' recruitment and retention strategies, followed by their views about measures and action that could make it easier to recruit staff with the required skills. In the last two sections, perceptions about the level of support to tackle skills challenges provided by local or regional, national and EU level organisations and authorities and familiarity with various EU initiatives for skills are discussed.

### 3.1. SMEs' recruitment and retention strategies

SMEs in this survey were also asked about what they do when faced with skills shortages. They were presented with a list of eight possible actions.

**The largest share of SMEs (43%) reply that, when faced with skills shortages, they make better use of talent within the company.** This action is **followed by investing more in training (selected by 35% of SMEs) and increasing job attractiveness in terms of financial and/or non-financial benefits (32%).** More than a quarter of SMEs (27%) say they collaborate with organisations in education or employment, or with associate or sectoral bodies, to deal with skills shortages. A similar proportion (26%) invest more in candidate searches, while 17% mention that they adjust (or lower) hiring standards. Finally, 23% of SMEs reply that they change work processes (i.e. automate, outsource etc.) and 9% say they abandon the activity facing skills shortages.

**Q5** When faced with skills shortages, does your company do any of the following? Please list all the apply. [MAXIMUM THREE ANSWERS ALLOWED] (% EU27)



Base: all SMEs (n=12 909)

In 17 Member States, the largest share of SMEs reply that, when faced with skills challenges, they **make better use of talent within the company** (e.g. staff mobility, job rotation, etc.). Additionally, the proportion selecting this response is 50% or higher in Ireland (50%), Sweden (53%), Italy (54%) and Greece (64%). In Hungary (29%), Portugal (29%) and Luxembourg (30%), this response is selected by far less respondents. In Portugal, for example, respondents are far more likely to **invest more in training** when faced with skills challenges (41%); this measure is also selected by more than 40% of respondents in the Netherlands (44%), Malta (47%), Italy (47%) and Ireland (49%). In Denmark, on the other hand, just 22% of respondents invest more in training.

More than half of SMEs in Slovakia (54%) and Czechia (55%) **increase job attractiveness in terms of financial and/or non-financial benefits** when faced with skill challenges, while in Portugal (17%) and Cyprus (18%), this response is selected by less than one in five respondents. The largest share saying their SME **invests more in candidate searches** when faced with skills challenges is observed in Luxembourg (37%) and the lowest share in Denmark and Latvia (both 11%). Across all Member States, less than one in four SMEs **adjust (or lower) hiring standards** (from 11% in Hungary and Slovenia to 22% in Belgium, Germany, Greece and Slovakia).

The proportion of SMEs saying they **collaborate with organisations in education or employment, or with associate or sectoral bodies**, ranges from 12% in Greece and 15% in both Bulgaria and Germany to 44% in Belgium. Countries closest to Belgium are Ireland (37%), France (35%) and Finland (34%).

Across all Member States, less than one in three SMEs **change work processes** (i.e. automate, outsource etc.) when faced with skills challenges (from 10% in Portugal to 32% in Spain) and less than one in six **abandon the business activity facing skills shortages** (from no SMEs in Portugal to 16% in Germany).

**Q8** When faced with skills shortages, does your company do any of the following? Please list all the apply. [MAXIMUM THREE ANSWERS ALLOWED] (% by country)

		Make better use of talent within the company (e.g. staff mobility, job rotation, etc.)	Invest more in training	Increase job attractiveness in terms of financial and/or non-financial benefits	Collaborate with organisations in education or employment, or with associate or sectoral bodies	Invest more in candidate searches	Change work processes (i.e. automate, outsource, etc.)	Adjust (or lower) hiring standards	Abandon the business activity facing skills shortages
EU27		43	35	32	27	26	23	17	8
BE		42	34	37	44	32	24	22	9
BG		43	27	31	15	18	21	12	8
CZ		37	34	55	31	31	22	18	5
DK		37	22	25	28	11	21	13	7
DE		41	26	35	15	21	23	22	16
EE		44	27	37	24	13	24	12	9
IE		50	49	22	37	18	17	16	2
EL		64	28	34	12	29	27	22	7
ES		48	26	23	22	26	32	19	9
FR		41	38	30	35	29	23	18	9
HR		40	36	31	28	26	18	20	5
IT		54	47	32	31	29	24	13	2
CY		43	36	18	22	30	15	16	6
LV		39	25	29	22	11	25	13	7
LT		41	24	42	25	28	13	14	6
LU		30	34	23	22	37	29	20	5
HU		29	24	33	22	30	17	11	5
MT		41	47	21	32	29	26	14	2
NL		39	44	36	27	28	22	14	6
AT		45	30	30	26	30	31	16	7
PL		40	35	28	27	20	25	18	7
PT		29	41	17	22	27	10	18	0
RO		45	40	46	24	25	25	20	12
SI		46	29	22	23	13	18	11	8
SK		34	35	54	33	26	25	22	13
FI		41	28	25	34	24	19	17	9
SE		53	32	27	26	25	15	18	14

Note (1): responses 'Other', 'None of these' and 'Don't know' not shown. Note (2): The higher the proportion selecting a response, the **darker blue** the cell. The highest-ranking response for each country shown in **orange**.

Base: all SMEs (n=12 909)

Investing more in candidate searches is more frequently mentioned by SMEs active in services (36%) or industry (37%) than by SMEs in retail (33%) or industry (30%). SMEs active in services are also somewhat more likely than their counterparts in other activity sectors to mentioned investing more in candidates searches (27% vs, for example, 22% in industry) and collaborating with organisations in education or employment, or with associate or sectoral bodies (29% vs, for example, 22% in retail). SMEs in manufacturing, on the other hand, are more likely than their counterparts in other sector to say that they change work processes (e.g. automate, outsource etc.) when faced with skills shortages (33% vs 22%-24% in the other activity sectors).

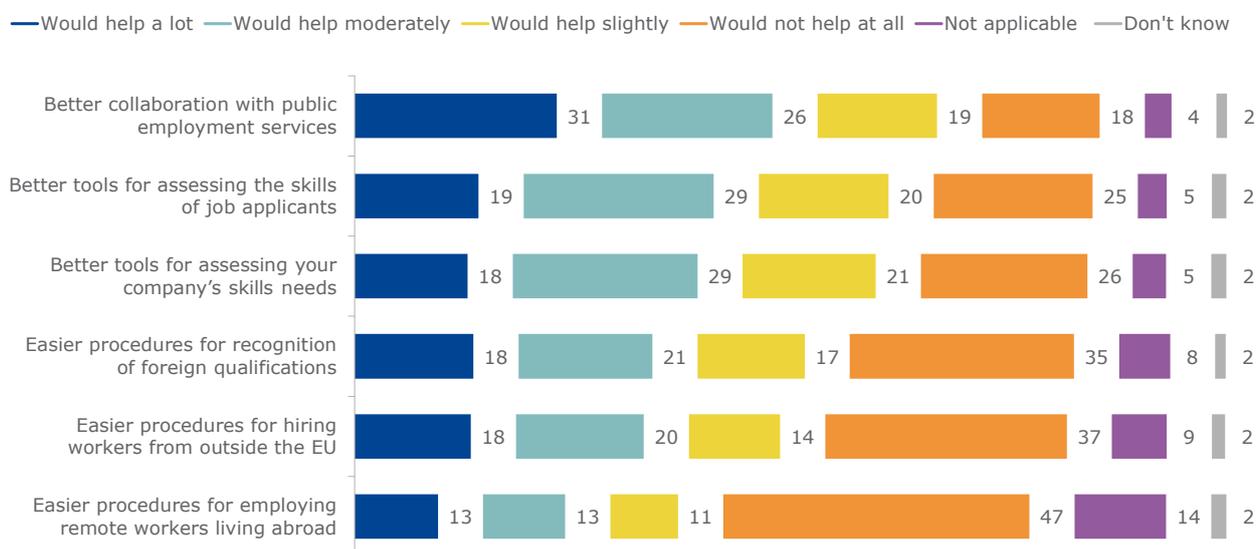
The proportions selecting the actions presented tend to be somewhat higher among larger SMEs (both in terms of number of employees and annual turnover). For example, 35% of SMEs with between 50 and 249 employees say that they collaborate with organisations in education or employment, or with associate or sectoral bodies, when faced with skills shortages; among smaller SMEs this figure is 27% (less than ten employees) or 28% (between 10 and 49 employees). Similarly, among SMEs with more than €2 million in annual turnover, 44% reply that, when faced with skills shortages, they invest more in training; this figure decreases to 32% in SMEs with up to €100 000 in annual turnover.

### 3.2. Making it easier to recruit staff with the required skills

About three in ten respondents (31%) reply that **better collaboration with public employment services** would help their company 'a lot' to make recruiting staff with the required skills easier; another quarter (26%) answer that this would help 'moderately'. Nearly half of respondents think that **better tools for assessing the skills of job applicants** would at least help moderately (19% 'would help a lot' and 29% 'would help moderately') and a similar share say this about **better tools for assessing their company's skills needs** (18% 'would help a lot' and 29% 'would help moderately').

For each of the **three measures related to hiring workers from abroad or living abroad**, a **larger share do not think these would help** their company to make it easier to recruit staff with the required skills. For example, 47% of SMEs answer that easier procedures for employing remote workers living abroad would not help at all to make recruiting staff easier. The proportions saying that the measures related to hiring workers from abroad or living abroad would at least moderately help are 39% for easier procedures for recognition of foreign qualifications, 38% for easier procedures for hiring workers from outside the EU and 26% for easier procedures for employing remote workers living abroad.

**Q8** How much would each of the following help your company make recruiting staff with the required skills easier? (% EU27)



Base: all SMEs (n=12 909)

Across all but one of the Member States, the largest (or joint-largest) share of SMEs reply that **better collaboration with public employment services** would at least moderately help their SME in making recruiting staff with the required skills easier; the proportion of 'help a lot' and 'help moderately' responses for this statement varies between 35% in Latvia and 75% in Greece.

In Romania, equal shares (both 71%) say that better collaboration with public employment services and **better tools for assessing the skills of job applicants** would at least moderately help to make it easier to recruit staff with the required skills. In the remaining countries, the proportion of 'help a lot' and 'help moderately' responses for the latter statement ranges from 28% in Denmark and Slovenia to 67% in Cyprus.

The largest share of respondents in Portugal (65%) reply that **better tools for assessing their skills needs** would at least moderately help their SME in making recruiting staff with the required skills easier. This proportion is also higher than 60% in Romania (63%), Cyprus (67%) and Greece (68%). The lowest proportions of 'help a lot' and 'help moderately' responses for this statement are observed in Denmark (23%), and Slovenia and Sweden (both 24%).

In line with the EU average results, across most Member States, smaller shares of respondents answer that **measures related to hiring workers from abroad or living abroad** would at least moderately help their SME in making recruiting staff with the required skills easier. For example, the proportion of 'help a lot' and 'help moderately' responses for 'easier procedures for hiring workers from outside the EU' ranges from 17% in Hungary to 54% in Ireland

**Q8** How much would each of the following help your company make recruiting staff with the required skills easier? (% 'Would help a lot' + 'Would help moderately', by country)

		Better collaboration with public employment services	Better tools for assessing the skills of job applicants	Better tools for assessing your company's skills needs	Easier procedures for recognition of foreign qualifications	Easier procedures for hiring workers from outside the EU	Easier procedures for employing remote workers living abroad
EU27		58	49	46	39	38	26
BE		54	42	34	24	22	11
BG		54	43	44	33	25	16
CZ		44	34	33	28	28	21
DK		45	28	23	24	23	11
DE		45	40	31	43	36	27
EE		41	34	29	25	20	21
IE		62	48	56	59	54	40
EL		75	63	68	58	45	29
ES		58	39	43	30	36	24
FR		64	51	51	42	40	24
HR		66	60	58	46	33	30
IT		68	64	59	40	43	25
CY		70	67	67	56	44	27
LV		35	33	32	23	25	14
LT		46	42	40	36	37	29
LU		66	45	37	50	43	46
HU		47	35	39	23	17	12
MT		59	57	57	51	44	34
NL		60	54	49	46	48	34
AT		59	39	39	47	45	33
PL		57	52	48	40	41	28
PT		57	57	65	45	42	38
RO		71	71	63	60	49	36
SI		42	28	24	28	30	14
SK		58	41	35	41	35	24
FI		50	41	31	18	25	14
SE		40	36	24	34	28	25

Note: The higher the proportion selecting a response, the **darker blue** the cell.

The highest-ranking response for each country shown in **orange**.

Base: all SMEs (n=12 909)

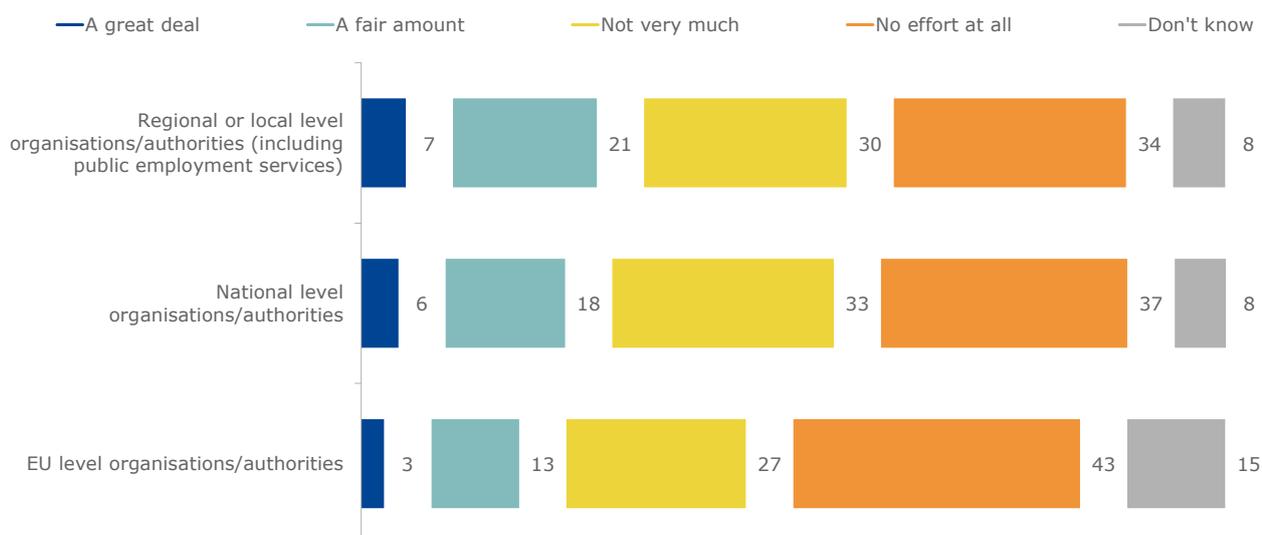
The analysis by types of SMEs shows mostly minor (statistically not significant) differences in terms of the proportion saying that the various measures presented would help their SME in making recruiting staff with the required skills easier. It is worth noting that smaller SMEs, in terms of number of employees, are often the most pessimistic – i.e. they tend to be the most likely to select the response 'would not help at all', especially with respect to the measures related to hiring workers from abroad or living abroad. For example, 35% of SMEs with less than ten employees and 34% of those with between 10 and 49 employees, compared to 29% of SMEs with between 50 and 249 employees, reply that easier procedures for recognition of foreign qualifications would not help at all to make recruiting staff with the required skills easier.

### 3.3. Perceptions about support to tackle skills challenges

**Just over a quarter of SMEs across the EU reply that regional or local organisations and authorities (incl. public employment services) make an effort to support SMEs to tackle skills challenges** (7% for 'a great deal' and 21% for 'a fair amount'). **About one in four respondents say the same about national organisations and authorities** (6% for 'a great deal' and 18% for 'a fair amount'). Less than one in five respondents, however, share this view about EU level organisations and authorities (3% for 'a great deal' and 13% for 'a fair amount').

The majority view among SMEs across the EU is that local or regional, national and EU level organisations and authorities are **not making very much effort, or no effort at all, to support SMEs to tackle skills challenges**. For example, one third of respondents reply that national level organisations and authorities are not very much making efforts to support SMEs like their and close to four in ten (37%) believe that no efforts at all are made by national level organisations and authorities.

**Q6** How much effort do you think each of the following are making to support companies like yours to tackle skills challenges? (% EU27)



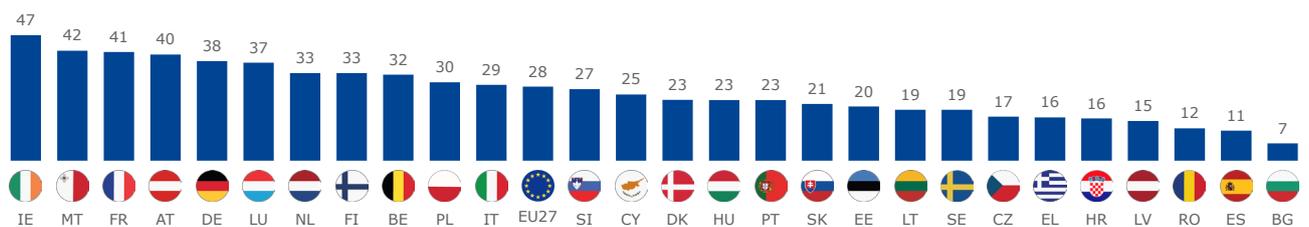
Base: all SMEs (n=12 909)

Close to one in two SMEs in Ireland (47%) reply that **regional or local organisations and authorities (incl. public employment services)** are making at least a fair amount of effort to support SMEs to tackle skills challenges. This view is also shared by about four in ten SMEs in Austria (40%), France (41%) and Malta (42%). In Bulgaria, on the other hand, just 7% of SMEs reply that regional or local organisations and authorities are making at least a fair amount of effort to support SMEs. A similar picture emerges for views about support provided by **national organisations and authorities**, with SMEs in Ireland being the most likely to positively evaluate the level of efforts made (46%) and SMEs in Bulgaria – together with those in Spain – being the least likely to do so (both 6%).

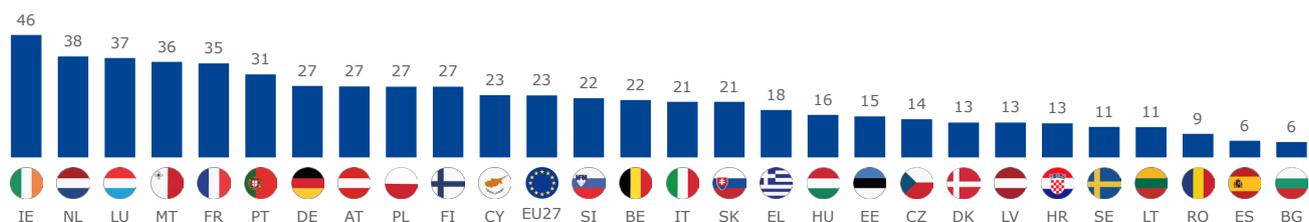
Finally, the proportion of SMEs saying that **EU level organisations and authorities** are making at least a fair amount of efforts to support SMEs like theirs to tackle skill challenges ranges from 7% in Sweden to 36% in Ireland.

**Q6** How much effort do you think each of the following are making to support companies like yours to tackle skills challenges? (% 'A great deal' + 'A fair amount', by country)

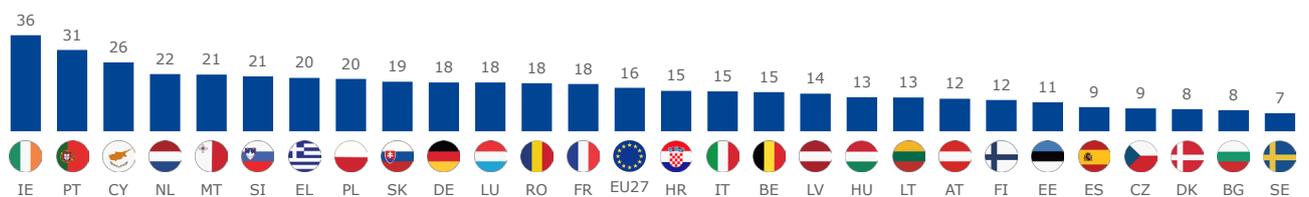
### Regional or local level organisations/authorities (including public employment services)



### National level organisations/authorities



### EU level organisations/authorities



Base: all SMEs (n=12 909)

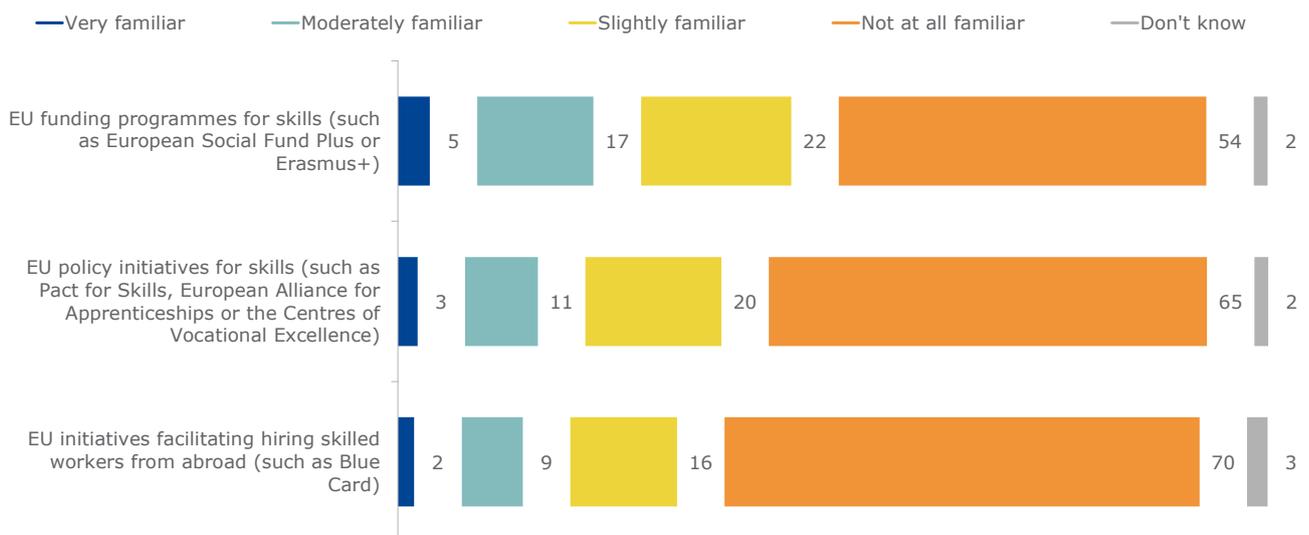
Differences across different types of SMEs tend to be minor (and not statistically significant) for this question.

### 3.4. Awareness about EU funding and initiatives for skills

**Familiarity with various EU programmes and initiatives related to skills is low – just a handful of SMEs report being 'very familiar' with EU funding programmes for skills** (such as European Social Fund Plus or Erasmus+) (5%), **EU policy initiatives for skills** (such as Pact for Skills, European Alliance for Apprenticeships or the Centres of Vocational Excellence) (3%) or **EU initiatives facilitating hiring skilled workers from abroad** (such as Blue Card). Another 17% of SMEs say they are 'moderately familiar' with EU funding programmes for skills, while this figure is lower for EU policy initiatives for skills (11%) and EU initiatives facilitating hiring skilled workers from abroad (9%).

The proportion saying they are '**not at all familiar**' is 54% for EU funding programmes for skills, 65% for EU policy initiatives for skills and 70% for EU initiatives facilitating hiring skilled workers from abroad.

**Q7** How familiar are you with each of the following? (% EU27)



Base: all SMEs (n=12 909)

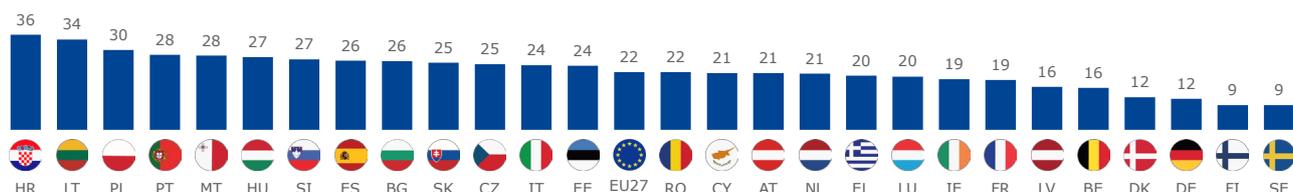
More than a third of SMEs in Lithuania (34%) and Croatia (36%) say that they are 'very' or 'moderately familiar' with **EU funding programmes for skills** (such as European Social Fund Plus or Erasmus+); in the other Member States, the proportion being familiar ranges from 9% in Finland and Sweden and 30% in Poland.

The proportion of SMEs being 'very' or 'moderately familiar' with **EU policy initiatives for skills** (such as Pact for Skills, European Alliance for Apprenticeships or the Centres of Vocational Excellence) is 25% in Poland, 23% in Malta and 21% in the Netherlands, but then decreases to 4% in Finland and 3% in Slovakia.

Across all Member States, less than a quarter of SMEs are 'very' or 'moderately familiar' with **EU initiatives facilitating hiring skilled workers from abroad** (such as Blue Card); the proportion being familiar varies between 4% in Finland and 23% in Austria.

**Q7** How familiar are you with each of the following? (% 'Very' + 'Moderately familiar', by country)

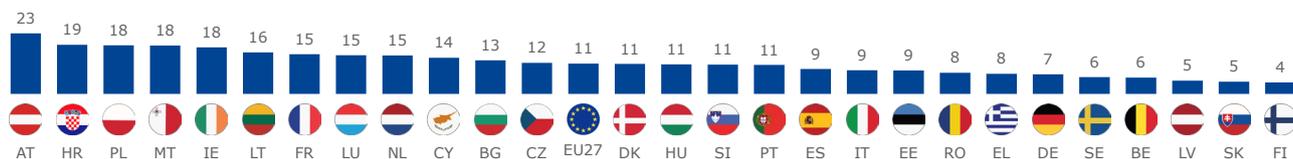
#### EU funding programmes for skills (such as European Social Fund Plus or Erasmus+)



#### EU policy initiatives for skills (such as Pact for Skills, European Alliance for Apprenticeships or the Centres of Vocational Excellence)



#### EU initiatives facilitating hiring skilled workers from abroad (such as Blue Card)



Base: all SMEs (n=12 909)

Differences across different types of SMEs tend to be minor (and not statistically significant) for this question.

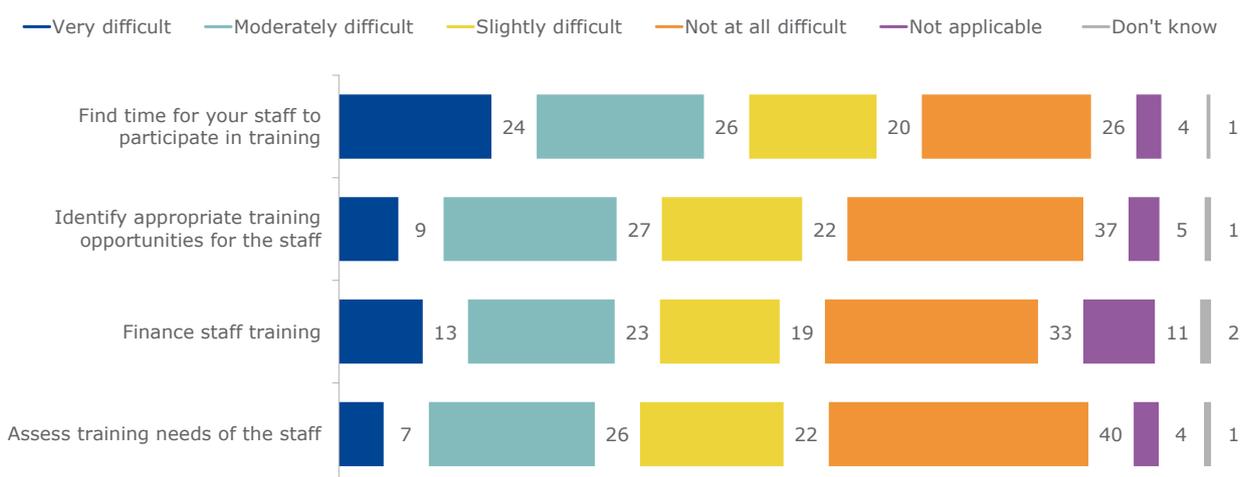
## Section 4. Employee training

This chapter looks at the results of two questions about employee training. The first question presented SMEs with various challenges with respect to employee training, while the second question asked about who should be responsible for covering the costs of job-related staff training.

### 4.1. Challenges with respect to employee training

Presented with four statements about difficulties related to staff training, **the largest share of SMEs say they find it 'very' (24%) or 'moderately difficult' (26%) to find time for their staff to participate in training**. Smaller shares of SMEs find it difficult to identify appropriate training opportunities for their staff (9% 'very difficult' and 27% 'moderately difficult'), finance staff training (13% 'very difficult' and 23% 'moderately difficult') and assess training needs of their staff (7% 'very difficult' and 26% 'moderately difficult').

**Q2** How difficult is it for your company to: (% EU27)



Base: all SMEs (n=12 909)

Across all statements, **there is a large variation across the Member States** in the proportion of respondents saying that training challenges described in the statements are 'very' or 'moderately' difficult for their SME. Moreover, the proportion of 'very' and 'moderately' important responses are each time among the highest in countries, such as Greece and Croatia, while they are the lowest in Denmark, followed by Finland. For example, the proportion of respondents saying that it is 'very' or 'moderately difficult' to find time for their staff to participate in training ranges from 28% in Denmark and 32% in Finland, to 68% in Croatia. Countries close to Croatia include France (62%) and Greece (60%). Similarly, 12% of respondents in Denmark and 17% in Finland find it 'very' or 'moderately difficult' to identify appropriate training opportunities for the staff; this proportion increases to 57% in Greece. In Italy (51%), Croatia (49%), Slovakia and Romania (both 48%), about half of respondents find this 'very' or 'moderately difficult'.

## Q2 How difficult is it for your company to: (% 'Very' + 'Moderately difficult', by country)

		Find time for your staff to participate in training	Identify appropriate training opportunities for the staff	Finance staff training	Assess training needs of the staff
EU27		50	36	36	33
BE		45	31	33	29
BG		42	28	43	21
CZ		42	25	27	19
DK		28	12	16	9
DE		29	21	30	20
EE		39	18	40	24
IE		46	35	28	22
EL		60	57	60	31
ES		52	36	40	27
FR		62	38	34	37
HR		68	49	61	44
IT		57	51	37	49
CY		41	39	41	24
LV		41	39	42	25
LT		48	42	39	30
LU		48	24	38	29
HU		39	31	41	25
MT		51	43	34	33
NL		45	32	28	38
AT		49	31	22	24
PL		53	41	40	33
PT		55	29	24	43
RO		55	48	59	40
SI		39	26	30	26
SK		58	48	50	43
FI		32	17	30	18
SE		37	24	35	14

Note: The higher the proportion selecting a response, the **darker blue** the cell.

The highest-ranking response for each country shown in **orange**.

Base: all SMEs (n=12 909)

The analysis by types of SMEs shows some of the largest differences in the proportion of respondents selecting the 'not at all difficult' response. For example, while 39% of respondents in SMEs active in services reply that it is 'not at all difficult' to identify appropriate training opportunities for the staff, this proportion is 29% for respondents in SMEs active in manufacturing. Similarly, 41% of respondents in SMEs with between 50 and 249 employees find it 'not at all difficult' to identify appropriate training opportunities for the staff, while this figure increases to 36% in SMEs with between 10 and 49 employees and to 37% in SMEs with less than ten employees. Respondents in the smallest SMEs (less than ten employees) are also the least likely to reply that it is 'not difficult at all' to finance staff training (33% vs 40% in SMEs with between 10 and 49 employees and 42% in those with between 50 and 249 employees). As similar observation can be made with respect to turnover of the SMEs. Finally, respondents in smaller SMEs are more likely than their counterparts in large SMEs to say that it is 'very difficult' to find time for their staff to participate in training; this proportion is 24% in SMEs with less than ten employees, 22% in SMEs with between 10 and 49 employees and 18% in SMEs with between 50 and 249 employees. Difference for the statement about assessing their staff's training needs are minor across the different types of SMEs.

## 4.2. Costs of job-related staff training

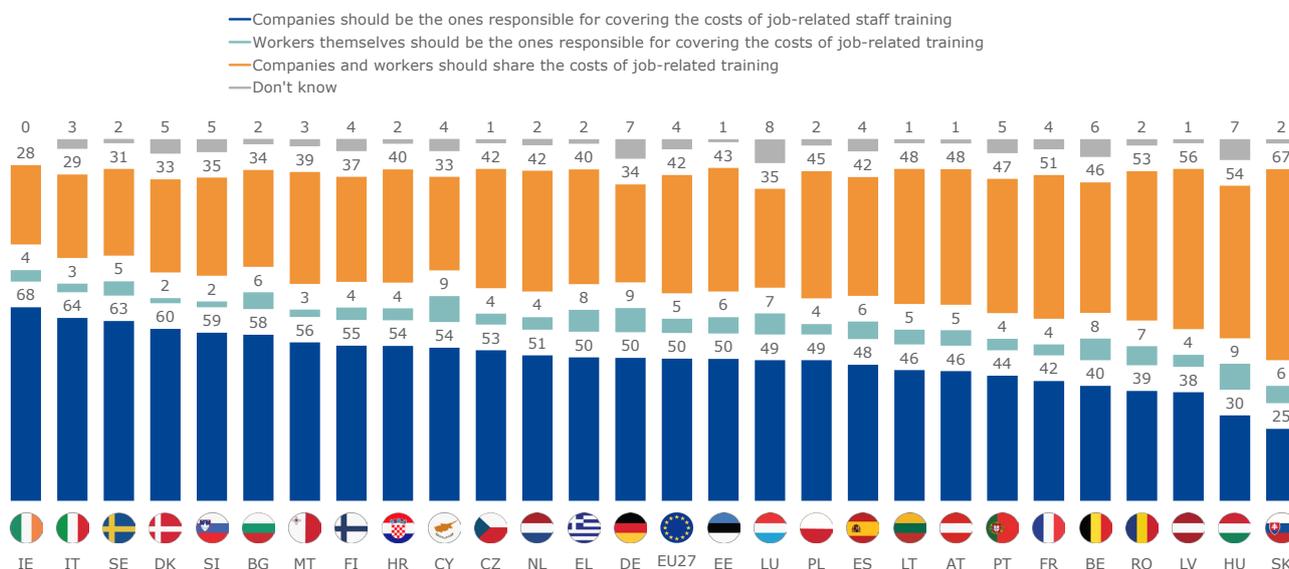
**One in two SMEs across the EU (50%) reply that companies should be responsible for covering the costs of job-related staff training, compared to 42% who state that companies and workers should share the costs of job-related training.** Just 5% of SMEs share the view that workers themselves should be the ones responsible for covering the costs of job-related training.

There is a **large variation across Member States** in SMEs' views about who should be responsible for covering the costs of job-related staff training. More than six in ten SMEs in Sweden (63%), Italy (64%) and Ireland (68%) answer that **companies** should be the ones responsible for covering the costs of job-related training. In Slovakia (25%) and Hungary (30%), on the other hand, less than half as many respondents share this view, while more than half of respondents answer that **companies and workers** should share the costs of job-related training (54% in Hungary and 67% in Slovakia).

In total, in 12 Member States, the majority view is that companies should be the ones responsible for covering the costs of job-related staff training. In five Member States, a majority say that companies and workers should share the costs of job-related training: Hungary and Slovakia (see above), France (51%), Romania (53%), Hungary (54%) and Latvia (56%).

Across all Member States, less than one in ten respondents think that **workers** themselves should be the ones responsible for covering the costs of job-related training (from 2% in Denmark and Slovenia to 9% in Cyprus, Germany and Hungary).

### Q9 Which of the following statements is closest to your opinion? (% by country)



Base: all SMEs (n=12 909)

Larger SMEs, both in terms of number of employees and annual turnover, are more likely to state that companies should be the ones responsible for covering the costs of job-related training, while smaller SMEs are more likely to share the view that these costs should be shared between companies and workers. For example, among SMEs with between 50 and 249 employees, 60% reply that companies should be covering the covering the costs of job-related training; this proportion decreases to 50% of SMEs with less than ten employees. Conversely, the proportion saying that the costs of job-related training should be shared between companies and workers decreases from 42% in SMEs with less than ten employees to 29% in SMEs with between 50 and 249 employees.

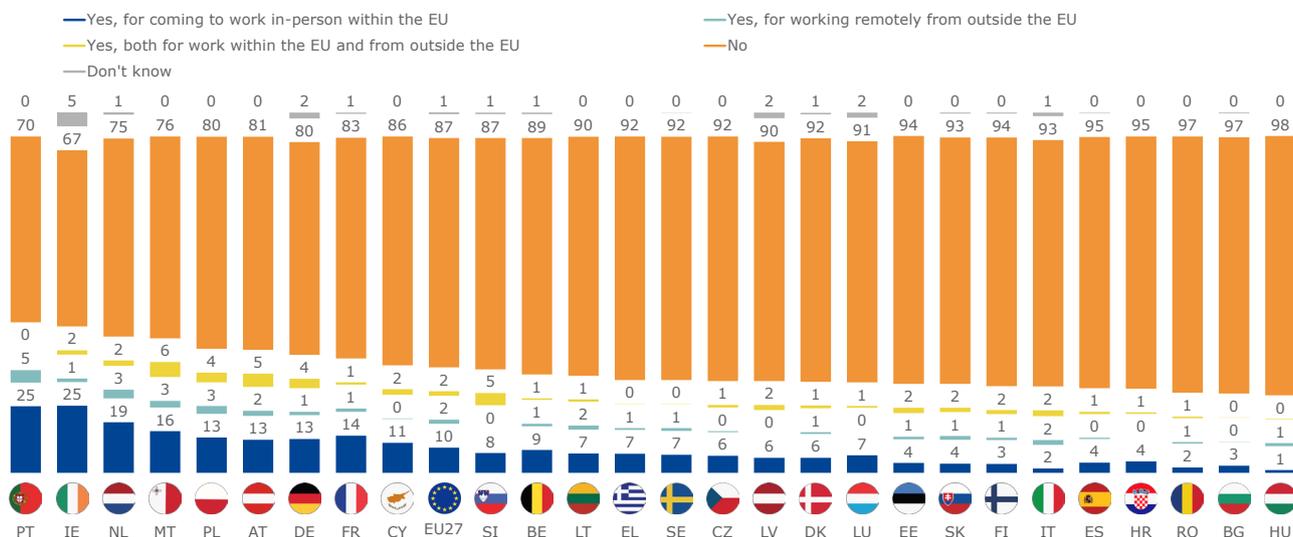
## Section 5. Recruitment of staff from outside the EU

On average, across the EU, 10% of SMEs report having recently **recruited someone from outside the EU (i.e. not a national nor a resident in any of the EU Member States) to come to work in-person within the EU** and 2% that they have recently recruited staff from outside the EU, both to come work in-person within the EU and **for working remotely from outside the EU**. Another small share (2%) reply that they have recently recruited from outside the EU, but only for working remotely from outside the EU.

Larger SMEs are more likely than smaller ones to have recently recruited someone from outside the EU; for example, 22% of SMEs with 50-249 employees have recently recruited someone from outside the EU to come to work in-person within the EU, compared to 9% of SMEs with less than 10 employees.

In Portugal and Ireland, a quarter of SMEs report having recently recruited someone from outside the EU to come to work in-person within the EU; this figure is also somewhat higher in Malta (16%) and the Netherlands (19%). A handful of respondents in Ireland (5%), Malta (3%), the Netherlands (3%) and Poland (3%) have recently hired someone working remotely from outside the EU. In five Member States, about one in 20 SMEs have hired someone from outside the EU to work in-person in the EU and have hired someone working remotely from outside the EU: Malta (6%), Austria (5%), Slovenia (5%), Germany (4%) and Poland (4%).

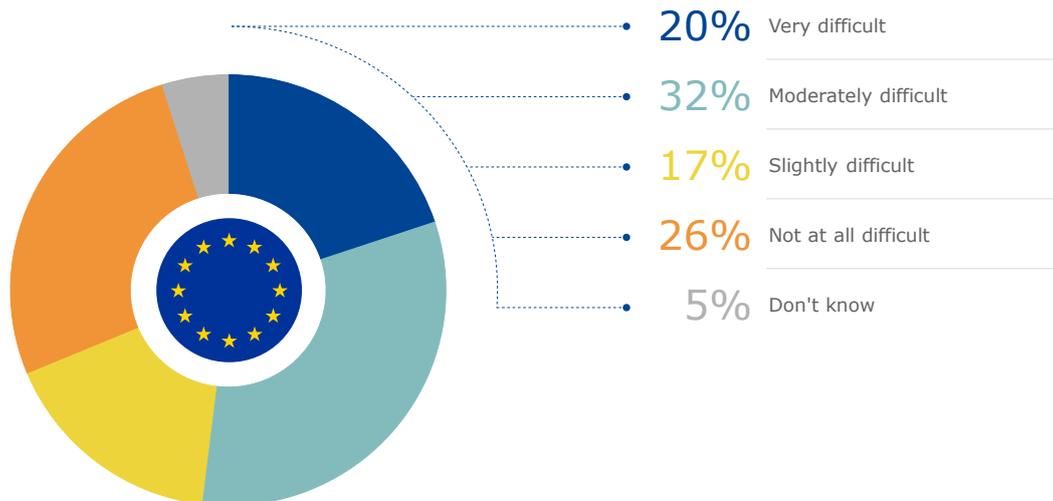
**Q11** Has your company recently recruited anyone from outside the European Union (i.e. not a national nor a resident in any of the EU Member States)? (% by country)



Base: all SMEs (n=12 909)

**Of those SMEs that have recently recruited someone from outside the EU, 20% describe the hiring process of this recent recruit (or of these recent recruits) as 'very difficult' and 32% as 'moderately difficult' – compared to 17% who say the process (or processes) has been 'slightly difficult' and 26% that it has not been difficult at all.**

**Q12a** How would you describe the hiring process of this recent recruit (or recruits) from outside the European Union? (% EU27)



Base: SMEs that recently recruited someone from outside the EU (n=2 048)

The **most-mentioned reason for not having recently recruited anyone from outside the EU is simply that the SME did not recruit anyone recently** (37%). Another frequently mentioned reason, however, is **no experience with hiring from outside the EU** (25%). These reasons are followed closely by **'due to specific language skills required'** (25%), **'a sufficient number of candidates available within the EU'** (22%), **'no appropriate candidates from outside the EU'** (18%) and **'due to the expected complexity (length, cost, uncertainty etc.) of international recruitment and migration procedures'** (17%). Smaller shares refer to 'uncertainty about the authenticity and comparability of foreign qualifications' (12%) and 'lack of institutional support and guidance for international recruitment procedures' (11%).

**Q12b** What are the main reasons for not recruiting anyone from outside the European Union?  
[MAXIMUM THREE ANSWERS ALLOWED] (% EU27)



Base: SMEs that did not recruit someone from outside the EU recently (n=10 765)

In most Member States, the largest share of SMEs that did not recruit someone from outside the EU recently, say that this is because they **did not recruit anyone at all recently**; the proportion selecting this response varies between 23% in Luxembourg and 57% in Lithuania. In Belgium, on the other hand, the most-frequently given reason for not recruiting from outside the EU – selected by 43% of SMEs – is that there are sufficient candidates available from within the EU, while in France, the largest share (29%) state that there are no appropriate candidates from outside the EU.

There is also a large variation across the Member States in the proportion of SMEs saying that no one was recruited recently from outside the EU because of **their lack of experience in hiring from outside the EU** (from 8% in Portugal to 39% in Belgium). In Italy, this is the most-cited reason (selected by 34%).

Between 12% of SMEs in Portugal and 43% in Belgium mention **specific language skills required** as a reason for not hiring from outside the EU. The largest shares mentioning '**uncertainty about the authenticity and comparability of foreign qualifications**' are found in Czechia and Romania (both 18%). Between 4% of SMEs in Hungary and 27% in Czechia and Romania refer to the **expected complexity (length, cost, uncertainty etc.) of international recruitment and migration procedures**. Finally, **a lack of institutional support and guidance for international recruitment procedures** is mentioned most frequently in Malta (21%) and Luxembourg (22%).

Differences across different types of SMEs tend to be minor (and not statistically significant) for this question.

**Q12b** What are the main reasons for not recruiting anyone from outside the European Union?  
[MAXIMUM THREE ANSWERS ALLOWED] (% by country)

	Company did not recruit anyone recently	No experience in hiring from outside the European Union	Due to specific language skills required	Sufficient number of candidates are available within the European Union	No appropriate candidates from outside the European Union	Due to the expected complexity of international recruitment and migration procedures	Uncertainty about the authenticity and comparability of foreign qualifications	Lack of institutional support and guidance for international recruitment procedures
EU27 	37	25	25	22	18	17	11	12
BE 	33	39	43	43	24	19	12	13
BG 	32	11	21	10	9	19	6	8
CZ 	49	22	41	18	26	27	18	13
DK 	40	23	33	28	12	8	5	3
DE 	36	23	29	15	21	12	10	9
EE 	53	25	32	21	8	19	16	5
IE 	34	17	17	29	12	15	0	12
EL 	32	25	21	30	21	25	10	13
ES 	42	26	20	24	10	20	11	14
FR 	26	23	23	22	29	15	10	9
HR 	37	32	28	27	12	11	9	6
IT 	29	34	24	28	16	20	12	19
CY 	40	12	16	18	11	12	6	5
LV 	48	21	19	14	6	10	10	5
LT 	57	25	22	14	4	11	7	7
LU 	23	18	34	11	14	15	13	22
HU 	48	22	22	25	22	4	6	3
MT 	32	22	22	24	19	15	15	21
NL 	33	23	22	27	13	17	12	11
AT 	41	18	32	12	27	21	15	14
PL 	40	23	23	16	20	15	12	19
PT 	35	8	12	2	8	9	15	11
RO 	52	27	32	22	15	27	18	15
SI 	52	26	29	15	6	18	6	6
SK 	56	38	25	18	11	17	14	18
FI 	45	29	38	22	10	9	4	5
SE 	41	28	35	32	11	16	16	6

Note (1): responses 'Other', 'None of these' and 'Don't know' not shown.

Note (2): The higher the proportion selecting a response, the **darker blue** the cell.

The highest-ranking response for each country shown in **orange**.

Base: SMEs that did not recruit someone from outside the EU recently (n=10 765)

## Technical specifications

Between 4 and 24 May 2023, Ipsos European Public affairs carried out Flash Eurobarometer 529 at the request of the European Commission, Directorate-General for Employment, Social Affairs and Inclusion. It is a business survey coordinated by the Directorate-General for Communication, “Media monitoring and Eurobarometer” Unit.

This Flash Eurobarometer covers small and medium-sized enterprises (SMEs), active in manufacturing (NACE category C), retail (NACE category G), services (NACE categories H, I, J, K, L, M, N, P, Q, R, S) and industry (NACE categories B, D, E, F) and within the EU. Interviews took place with someone with decision-making responsibilities (managing director, general manager, CEO, financial director), someone leading the commercial activities (commercial manager, sales manager, marketing manager) or a legal officer. All interviews were carried via Computer-Assisted Telephone Interviewing (CATI).

The sample was selected from an international business database. Sampling targets were defined on both company size (using three different ranges: 1-9 employees, 10-49 employees and 50-249 employees) and sectors (industry, manufacturing, retail and services). These sampling targets were adjusted according to the country’s universe but were also reasoned in order to ensure that the sample was large enough in every cell.

### Margin of error

Survey results are subject to sampling tolerances. The “margin of error” quantifies uncertainty about (or confidence in) a survey result. As a general rule, the more interviews conducted (sample size), the smaller the margin of error. A sample of 500 will produce a margin of error of not more than 4.4 percentage points.

#### Statistical margins due to sampling tolerances (at the 95% level of confidence)

various sample sizes are in rows

various observed results are in columns

	5%	10%	25%	50%	75%	90%	95%
n=50	±6.0	±8.3	±12.0	±13.9	±12.0	±8.3	±6.0
n=100	±4.3	±5.9	±8.5	±9.8	±8.5	±5.9	±4.3
n=200	±3.0	±4.2	±6.0	±6.9	±6.0	±4.2	±3.0
n=500	±1.9	±2.6	±3.8	±4.4	±3.8	±2.6	±1.9
n=1000	±1.4	±1.9	±2.7	±3.1	±2.7	±1.9	±1.4
n=1500	±1.1	±1.5	±2.2	±2.5	±2.2	±1.5	±1.1
n=2000	±1.0	±1.3	±1.9	±2.2	±1.9	±1.3	±1.0

		Number of interviews	Fieldwork dates	Population of SMEs (absolute number)	Population of SMEs (as % of EU27 population)
EU27		<b>12 909</b>	<b>4.5.2023-24.5.2023</b>	<b>30 305 176</b>	100%
BE		501	4.5.2023-22.5.2023	818 647	2.70%
BG		500	9.5.2023-23.5.2023	386 186	1.27%
CZ		501	4.5.2023-23.5.2023	1 240 393	4.09%
DK		507	4.5.2023-23.5.2023	422 804	1.40%
DE		504	4.5.2023-23.5.2023	3 104 703	10.24%
EE		503	4.5.2023-17.5.2023	124 525	0.41%
IE		502	8.5.2023-19.5.2023	372 647	1.23%
EL		501	4.5.2023-19.5.2023	887 090	2.93%
ES		500	5.5.2023-20.5.2023	3 124 962	10.31%
FR		537	9.5.2023-23.5.2023	4 441 494	14.66%
HR		500	4.5.2023-24.5.2023	217 420	0.72%
IT		502	8.5.2023-19.5.2023	4 415 328	14.57%
CY		250	4.5.2023-17.5.2023	80 924	0.27%
LV		506	8.5.2023-17.5.2023	136 099	0.45%
LT		502	4.5.2023-19.5.2023	296 997	0.98%
LU		252	4.5.2023-23.5.2023	41 553	0.14%
HU		504	4.5.2023-22.5.2023	877 989	2.90%
MT		252	8.5.2023-19.5.2023	55 412	0.18%
NL		518	8.5.2023-23.5.2023	2 057 022	6.79%
AT		507	8.5.2023-22.5.2023	577 302	1.90%
PL		512	5.5.2023-22.5.2023	2 668 064	8.80%
PT		504	8.5.2023-19.5.2023	1 230 185	4.06%
RO		503	8.5.2023-19.5.2023	633 288	2.09%
SI		503	4.5.2023-17.5.2023	185 936	0.61%
SK		537	4.5.2023-23.5.2023	600 952	1.98%
FI		500	4.5.2023-23.5.2023	428 436	1.41%
SE		501	4.5.2023-22.5.2023	878 818	2.90%

## Questionnaire

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ASK ALL

**DX1 How important is it for the business model of your company to have workers with the right skills?**

(READ OUT - ONE ANSWER ONLY)

Very important	1
Moderately important	2
Slightly important	3
Not at all important	4
Don't know (DO NOT READ OUT)	998

ASK ALL

**Q1 To what extent are the following skills becoming more or less important for your company?**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE STATEMENTS 1-4]

Q1_1	"Soft skills" (e.g. flexibility, team work, communication, critical thinking)	1
Q1_2	"Hard skills" (e.g. technical or engineering skills)	2
Q1_3	"Green skills" (e.g. skills required for greening business activities)	3
Q1_4	"Digital skills" (e.g. skills required for adopting and/or using digital technologies)	4
	[RESPONSE SCALE]	
	Much more important	1
	Somewhat more important	2
	As important as before	3
	Somewhat less important	4
	Much less important	5
	Not applicable (DO NOT READ OUT)	997
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q2 How difficult is it for your company to:**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE STATEMENTS 1-6]

Q2_1	Find workers with the right skills	1
Q2_2	Retain skilled workers	2
Q2_3	Assess training needs of the staff	3
Q2_4	Identify appropriate training opportunities for the staff	4
Q2_5	Finance staff training	5
Q2_6	Find time for your staff to participate in training	6
	[RESPONSE SCALE]	
	Very difficult	1
	Moderately difficult	2
	Slightly difficult	3
	Not at all difficult	4
	Not applicable (DO NOT READ OUT)	997
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q3 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE STATEMENTS 1-5]

INTERVIEWER: If needed clarify, if more than one reason applies, please select the most important reason.

Q3_1	Managers	1
Q3_2	Professionals, associate professionals and technicians	2
Q3_3	Administrative, clerical and service workers	3
Q3_4	Machine operators, craft and skilled trades workers	4
Q3_5	Manual labourers	5
	[RESPONSE SCALE]	
	Yes, because applicants do not have the right qualifications, skills or experience	1
	Yes, because there are few or no applicants	2
	Yes, for another reason	3
	No difficulties	4
	Not applicable (DO NOT READ OUT)	997
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q4 Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements?**

(READ OUT - ONE ANSWER PER LINE) (RANDOMISE 2-3, KEEP 1 IN FIRST POSITION)

Q4_1	Skill shortages hold your company back in general business activities	1
Q4_2	Skill shortages hold your company back in greening business activities	2
Q4_3	Skill shortages hold your company back in adopting and/or using digital technologies	3
	[RESPONSE SCALE]	
	Totally agree	1
	Somewhat agree	2
	Somewhat disagree	3
	Totally disagree	4
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q5 When faced with skills shortages, does your company do any of the following? Please list all the apply.**

(READ OUT - MAX. 3 ANSWERS POSSIBLE) [RANDOMISE ITEMS 1 TO 8]

INTERVIEWER: Probe for up to three answers; if more than three apply, ask to list the three most important ones.

Invest more in candidate searches	1
Invest more in training	2
Collaborate with organisations in education or employment, or with associate or sectoral bodies	3
Change work processes (i.e. automate, outsource, etc.)	4
Abandon the business activity facing skills shortages	5
Adjust (or lower) hiring standards	6
Increase job attractiveness in terms of financial and/or non-financial benefits	7
Make better use of talent within the company (e.g. staff mobility, job rotation, etc.)	8
Other (DO NOT READ OUT)	9
None of these (DO NOT READ OUT)	10
Don't know/No answer (DO NOT READ OUT)	998

ASK ALL

**Q6 How much effort do you think each of the following are making to support companies like yours to tackle skills challenges?**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE 1-3]

Q6_1	EU level organisations/authorities	1
Q6_2	National level organisations/authorities	2
Q6_3	Regional or local level organisations/authorities (including public employment services)	3
	[RESPONSE SCALE]	
	A great deal	1
	A fair amount	2
	Not very much	3
	No effort at all	4
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q7 How familiar are you with each of the following?**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE 1-3]

Q7_1	EU policy initiatives for skills (such as Pact for Skills, European Alliance for Apprenticeships or the Centres of Vocational Excellence)	1
Q7_2	EU funding programmes for skills (such as European Social Fund Plus or Erasmus+)	2
Q7_3	EU initiatives facilitating hiring skilled workers from abroad (such as Blue Card)	3
	[RESPONSE SCALE]	
	Very familiar	1
	Moderately familiar	2
	Slightly familiar	3
	Not at all familiar	4
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q8 How much would each of the following help your company make recruiting staff with the required skills easier?**

(READ OUT - ONE ANSWER PER LINE) [RANDOMISE 1-6]

Q8_1	Better tools for assessing your company's skills needs	1
Q8_2	Better tools for assessing the skills of job applicants	2
Q8_3	Easier procedures for recognition of foreign qualifications	3
Q8_4	Easier procedures for hiring workers from outside the EU	4
Q8_5	Easier procedures for employing remote workers living abroad	5
Q8_6	Better collaboration with public employment services	6
	[RESPONSE SCALE]	
	Would help a lot	1
	Would help moderately	2
	Would help slightly	3
	Would not help at all	4
	Not applicable (DO NOT READ OUT)	997
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q9 Which of the following statements is closest to your opinion?**

(READ OUT - ONE ANSWER ONLY)

	Companies should be the ones responsible for covering the costs of job-related staff training	1
	Workers themselves should be the ones responsible for covering the costs of job-related training	2
	Companies and workers should share the costs of job-related training	3
	Don't know (DO NOT READ OUT)	998

ASK ALL

**Q10 When recruiting workers in your company, how important are educational qualifications (degrees, diplomas, certificates acquired)?**

(READ OUT - ONE ANSWER ONLY)

Very important	1
Moderately important	2
Slightly important	3
Not at all important	4
Don't know (DO NOT READ OUT)	998

ASK ALL

**Q11 Has your company recently recruited anyone from outside the European Union (i.e. not a national nor a resident in any of the EU Member States)?**

(READ OUT - ONE ANSWER ONLY)

[SCRIPTER: LIST OF EU MEMBER STATES TO BE INSERTED AS SUPPORT FOR INTERVIEWER; ADD 'The EU Member States are: ' before the list]

Yes, for coming to work in-person within the EU	1
Yes, for working remotely from outside the EU	2
Yes, both for work within the EU and from outside the EU	3
No	4
Don't know (DO NOT READ OUT)	998

ASK IF Q11=1 OR Q11=2 OR Q11=3

**Q12a How would you describe the hiring process of this recent recruit (or recruits) from outside the European Union?**

[SHOW IF Q12=3] Please refer to the hiring process for workers to work within the European Union.

(READ OUT - ONE ANSWER ONLY)

Very difficult	1
Moderately difficult	2
Slightly difficult	3
Not at all difficult	4
Don't know (DO NOT READ OUT)	998

ASK IF Q11=4

**Q12b What are the main reasons for not recruiting anyone from outside the European Union?**

(READ OUT - MAX. 3 ANSWERS POSSIBLE) (RANDOMISE ITEMS 2- 9, KEEP 1 IN FIRST POSITION)

INTERVIEWER: Probe for additional answers; if more than three answers apply, ask to list the three most important ones.

Company did not recruit anyone recently	1
Sufficient number of candidates are available within the European Union	2
No appropriate candidates from outside the European Union	3
Due to the expected complexity (length, cost, uncertainty, etc.) of international recruitment and migration procedures	4
Due to specific language skills required	5
No experience in hiring from outside the European Union	6
Lack of institutional support and guidance for international recruitment procedures	7
Uncertainty about the authenticity and comparability of foreign qualifications	8
Other (DO NOT READ OUT)	9
None of these (DO NOT READ OUT)	10
Don't know (DO NOT READ OUT)	998

## **Data annex**

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DX1 How important is it for the business model of your company to have workers with the right skills?

		Very important	Moderately important	Slightly important	Not at all important	Don't know
EU27		82	13	2	2	0
BE		69	22	5	4	0
BG		71	22	7	1	0
CZ		79	20	1	0	0
DK		74	20	5	1	0
DE		82	11	2	4	1
EE		77	18	3	2	0
IE		90	7	3	0	0
EL		86	13	1	0	0
ES		85	11	3	1	1
FR		83	12	2	3	1
HR		83	13	3	2	0
IT		86	13	1	1	0
CY		93	7	0	0	0
LV		76	17	4	3	1
LT		68	26	3	3	0
LU		75	15	2	4	5
HU		79	16	3	2	0
MT		89	7	2	1	1
NL		81	13	3	3	1
AT		96	4	0	0	0
PL		82	15	1	2	0
PT		90	9	0	0	0
RO		77	18	3	1	0
SI		76	18	3	4	0
SK		58	25	12	4	1
FI		82	16	2	0	0
SE		83	12	2	2	1

Q1\_1 To what extent are the following skills becoming more or less important for your company? **"Soft skills"** (e.g. flexibility, team work, communication, critical thinking)

		Much more important	Somewhat more important	As important as before	Somewhat less important	Much less important	Not applicable	Don't know
EU27		48	20	27	2	2	1	0
BE		42	24	31	2	0	0	0
BG		55	12	27	4	1	1	0
CZ		39	21	34	4	1	1	0
DK		46	22	30	2	0	0	0
DE		52	17	25	2	3	1	0
EE		26	25	46	1	1	0	0
IE		52	19	25	2	1	0	0
EL		54	14	28	2	1	0	0
ES		49	19	30	2	1	1	0
FR		43	18	33	2	2	1	0
HR		61	18	20	0	1	0	1
IT		47	22	24	2	2	3	1
CY		77	12	5	3	3	0	1
LV		48	15	35	1	0	0	1
LT		40	17	38	3	2	0	0
LU		63	14	12	5	2	3	0
HU		41	13	41	1	1	1	1
MT		61	14	19	4	3	0	0
NL		54	25	18	2	1	0	1
AT		65	16	16	1	2	0	0
PL		48	20	23	5	3	0	0
PT		69	23	4	2	3	0	0
RO		33	21	42	1	2	0	0
SI		56	19	22	2	1	0	0
SK		46	18	34	1	1	1	0
FI		36	27	34	2	0	1	0
SE		36	21	39	1	0	1	1

Q1\_2 To what extent are the following skills becoming more or less important for your company? **"Hard skills"** (e.g. technical or engineering skills)

		Much more important	Somewhat more important	As important as before	Somewhat less important	Much less important	Not applicable	Don't know
EU27		31	16	33	8	6	6	1
BE		26	13	33	12	8	7	1
BG		33	10	31	4	6	16	0
CZ		21	14	38	12	10	5	1
DK		19	10	29	19	7	15	1
DE		46	20	26	4	2	2	0
EE		15	18	40	8	5	15	0
IE		31	18	11	17	9	14	0
EL		41	20	25	6	4	4	0
ES		27	19	39	8	4	4	0
FR		25	13	35	9	7	10	1
HR		33	20	30	1	1	13	2
IT		36	13	31	5	6	6	2
CY		43	14	12	16	11	4	0
LV		43	10	26	7	6	7	1
LT		31	13	38	6	5	6	1
LU		31	23	17	11	11	6	0
HU		20	12	34	9	12	13	1
MT		36	17	25	8	11	3	0
NL		33	17	24	10	10	6	1
AT		31	20	24	11	10	4	0
PL		31	15	35	8	6	5	0
PT		41	17	31	3	6	2	0
RO		32	14	40	8	4	3	0
SI		33	16	30	8	6	8	0
SK		38	14	36	5	5	2	0
FI		19	14	44	11	7	5	0
SE		14	17	41	11	10	6	1

Q1\_3 To what extent are the following skills becoming more or less important for your company? **"Green skills"** (e.g. skills required for greening business activities)

		Much more important	Somewhat more important	As important as before	Somewhat less important	Much less important	Not applicable	Don't know
EU27		22	20	32	11	8	5	1
BE		18	22	29	13	17	2	0
BG		16	19	30	3	11	18	3
CZ		6	7	39	16	24	9	0
DK		22	17	28	16	5	11	2
DE		23	19	26	16	13	2	1
EE		14	17	48	7	6	9	1
IE		26	19	21	11	3	11	11
EL		22	21	26	10	14	8	0
ES		24	22	41	6	5	2	0
FR		27	22	29	10	5	5	3
HR		19	31	32	3	2	12	1
IT		20	23	36	13	2	6	1
CY		29	18	11	24	12	5	1
LV		16	17	33	11	13	8	2
LT		15	23	39	10	8	4	1
LU		43	18	13	11	6	7	2
HU		17	14	39	7	6	16	1
MT		28	23	23	9	9	8	1
NL		28	20	26	13	6	6	2
AT		17	28	24	20	9	2	0
PL		20	17	31	11	12	8	1
PT		40	24	25	3	7	2	0
RO		19	16	46	5	9	4	1
SI		18	22	36	9	10	5	0
SK		15	18	41	10	7	6	2
FI		13	29	43	6	7	2	1
SE		13	25	40	9	8	3	2

Q1\_4 To what extent are the following skills becoming more or less important for your company? **"Digital skills"** (e.g. skills required for adopting and/or using digital technologies)

		Much more important	Somewhat more important	As important as before	Somewhat less important	Much less important	Not applicable	Don't know
EU27		38	24	23	7	5	2	0
BE		28	31	18	12	6	5	1
BG		45	17	23	4	6	4	0
CZ		18	21	33	14	11	4	0
DK		34	22	28	10	3	3	1
DE		35	24	21	11	9	2	0
EE		22	26	40	3	4	5	1
IE		46	31	10	4	3	5	2
EL		65	17	13	3	1	1	0
ES		45	23	27	2	3	1	0
FR		34	26	25	6	4	4	0
HR		52	24	20	1	0	3	0
IT		41	25	23	4	4	3	1
CY		71	16	5	5	2	0	1
LV		37	18	26	7	8	4	0
LT		28	22	31	8	7	4	0
LU		40	16	17	17	9	2	0
HU		37	22	30	6	3	2	1
MT		47	15	26	10	1	2	0
NL		36	25	22	9	3	2	1
AT		38	18	21	15	8	0	0
PL		37	20	21	14	6	2	0
PT		46	28	15	4	6	2	0
RO		38	15	35	8	3	1	0
SI		40	23	20	7	6	4	0
SK		42	21	26	4	5	2	0
FI		32	33	28	4	3	0	0
SE		38	32	24	4	2	1	0

**Q2\_1 How difficult is it for your company to: Find workers with the right skills**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		52	26	10	9	3	1
BE		62	19	10	6	2	1
BG		51	26	11	8	4	0
CZ		59	24	9	5	3	0
DK		33	19	19	24	4	0
DE		51	20	13	11	5	1
EE		40	42	5	9	1	3
IE		34	30	12	18	2	3
EL		56	30	10	4	1	0
ES		56	24	13	7	1	0
FR		58	27	7	8	2	0
HR		60	29	4	4	2	1
IT		50	25	11	8	3	3
CY		47	24	18	11	0	0
LV		47	30	8	10	3	3
LT		45	33	9	10	3	0
LU		43	37	12	6	2	0
HU		63	18	5	8	6	1
MT		51	29	12	7	1	0
NL		39	29	14	12	4	2
AT		44	44	3	6	3	0
PL		45	33	10	9	4	0
PT		53	27	11	10	0	0
RO		57	29	7	4	2	0
SI		58	21	5	11	4	1
SK		68	22	4	3	1	2
FI		43	27	16	13	2	0
SE		40	26	16	14	3	1

Q2\_2 How difficult is it for your company to: **Retain skilled workers**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		21	31	17	27	3	1
BE		26	21	26	25	2	0
BG		17	29	24	22	7	2
CZ		28	35	16	18	1	1
DK		7	16	16	58	3	0
DE		17	16	21	36	9	1
EE		12	41	15	29	3	0
IE		13	38	12	34	3	0
EL		16	31	23	29	0	0
ES		13	30	23	32	2	1
FR		26	33	14	25	2	0
HR		30	37	7	24	1	1
IT		24	39	12	23	1	1
CY		16	25	21	37	2	0
LV		21	32	14	28	4	2
LT		22	34	13	28	2	1
LU		28	30	12	23	7	0
HU		27	36	11	24	2	0
MT		26	29	20	23	2	0
NL		21	33	18	25	3	0
AT		35	27	24	14	0	0
PL		22	39	15	20	5	0
PT		20	33	21	25	1	0
RO		22	39	22	15	2	0
SI		22	22	11	40	6	0
SK		42	36	11	9	2	1
FI		6	25	24	42	3	0
SE		5	18	25	49	4	0

Q2\_3 How difficult is it for your company to: **Assess training needs of the staff**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		7	26	22	40	4	1
BE		7	22	24	41	5	2
BG		5	17	34	40	4	0
CZ		3	16	14	63	4	0
DK		2	7	11	59	16	4
DE		5	16	23	48	7	2
EE		1	23	8	63	3	1
IE		5	18	24	49	4	2
EL		5	26	25	43	0	0
ES		7	20	27	45	1	0
FR		8	29	20	37	5	2
HR		6	38	21	32	1	1
IT		10	40	28	19	1	2
CY		8	16	30	45	2	0
LV		4	21	17	52	5	1
LT		5	26	13	49	7	1
LU		6	23	24	38	8	1
HU		6	19	15	50	10	1
MT		8	25	23	37	4	3
NL		10	28	18	37	6	2
AT		8	16	35	35	6	0
PL		6	27	22	41	3	0
PT		10	33	15	40	2	0
RO		4	36	27	33	0	0
SI		8	18	14	54	4	1
SK		10	34	23	31	2	1
FI		2	16	24	53	5	0
SE		3	11	16	65	4	1

Q2\_4 How difficult is it for your company to: **Identify appropriate training opportunities for the staff**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		9	27	22	37	5	1
BE		14	17	25	35	6	2
BG		8	20	28	36	6	2
CZ		5	20	19	49	7	1
DK		8	4	13	52	16	7
DE		8	13	19	50	8	3
EE		2	16	13	62	4	2
IE		8	27	19	45	1	0
EL		20	37	20	22	1	0
ES		13	23	27	36	1	0
FR		7	31	19	37	5	1
HR		9	40	15	29	5	3
IT		12	39	17	28	3	1
CY		16	23	26	34	1	0
LV		13	26	12	42	5	2
LT		5	37	14	37	6	1
LU		9	15	23	44	8	0
HU		8	23	15	40	11	2
MT		8	35	23	32	2	1
NL		9	23	24	35	8	1
AT		11	20	40	24	5	0
PL		5	36	25	30	5	0
PT		11	18	35	32	4	0
RO		9	39	29	22	0	0
SI		7	20	16	52	5	1
SK		11	37	20	27	3	1
FI		7	10	28	48	7	0
SE		7	17	14	58	3	1

Q2\_5 How difficult is it for your company to: **Finance staff training**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		13	23	19	33	11	2
BE		17	16	21	36	10	1
BG		19	24	31	19	6	1
CZ		7	20	19	50	4	1
DK		8	8	14	51	15	5
DE		12	18	19	43	7	2
EE		11	29	17	40	4	0
IE		3	25	18	42	11	0
EL		35	25	21	17	1	1
ES		14	27	24	34	1	1
FR		13	21	16	37	9	3
HR		23	38	12	24	2	1
IT		12	25	16	20	25	3
CY		17	24	26	30	3	1
LV		9	33	16	33	6	2
LT		13	26	16	37	8	0
LU		10	28	15	39	8	1
HU		16	25	10	38	10	1
MT		11	23	12	37	17	1
NL		11	18	16	29	23	3
AT		5	18	26	32	18	2
PL		12	28	18	33	10	0
PT		11	13	19	33	23	2
RO		15	44	22	17	1	0
SI		12	18	17	48	5	1
SK		22	29	28	19	2	1
FI		14	16	20	45	5	0
SE		12	23	15	45	4	1

Q2\_6 How difficult is it for your company to: **Find time for your staff to participate in training**

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Not applicable	Don't know
EU27		24	26	20	26	4	1
BE		29	16	23	23	8	0
BG		17	26	22	32	4	0
CZ		13	29	16	39	4	0
DK		17	11	12	45	14	1
DE		10	19	23	41	6	1
EE		11	28	15	40	5	0
IE		21	26	16	34	3	0
EL		29	32	20	18	1	1
ES		25	27	24	22	1	1
FR		31	31	13	21	4	0
HR		21	47	10	20	2	1
IT		34	23	23	18	0	2
CY		18	22	27	31	1	0
LV		13	29	13	39	5	1
LT		20	28	19	27	7	0
LU		26	22	15	25	12	0
HU		14	25	11	38	11	0
MT		25	26	18	27	4	1
NL		19	26	23	24	8	1
AT		19	30	28	17	6	0
PL		24	28	20	22	5	0
PT		29	26	22	22	2	0
RO		14	41	21	23	0	0
SI		17	22	13	45	3	0
SK		26	32	22	19	1	1
FI		15	16	23	40	5	1
SE		18	20	14	46	2	1

Q3\_1 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

### Managers

	Yes, because applicants do not have the right qualifications, skills or experience	Yes, because there are few or no applicants	Yes, for another reason	No difficulties	Not applicable	Don't know
EU27 	7	9	5	30	47	3
BE 	5	8	3	18	65	2
BG 	11	8	8	27	44	2
CZ 	5	10	4	38	43	1
DK 	6	1	2	24	63	3
DE 	5	9	4	45	34	2
EE 	7	5	1	49	36	2
IE 	13	10	3	45	25	5
EL 	4	9	3	44	39	0
ES 	5	5	4	22	62	2
FR 	6	8	7	24	50	4
HR 	11	19	4	32	34	1
IT 	9	7	2	23	54	5
CY 	1	9	2	69	18	1
LV 	8	8	6	34	41	2
LT 	10	12	7	21	50	1
LU 	18	11	5	21	41	3
HU 	4	6	3	22	64	1
MT 	13	14	3	37	32	1
NL 	11	14	5	36	32	2
AT 	2	7	7	42	43	0
PL 	11	15	9	25	40	1
PT 	6	4	7	54	25	4
RO 	6	10	7	22	55	0
SI 	4	9	2	66	19	0
SK 	10	9	3	22	54	2
FI 	6	10	3	34	45	3
SE 	7	5	3	25	58	3

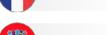
Q3\_2 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

**Professionals, associate professionals and technicians**

	Yes, because applicants do not have the right qualifications, skills or experience	Yes, because there are few or no applicants	Yes, for another reason	No difficulties	Not applicable	Don't know
EU27 	14	20	4	26	34	2
BE 	10	22	3	14	51	0
BG 	19	25	4	21	30	1
CZ 	14	29	4	19	32	2
DK 	17	8	2	24	49	1
DE 	9	15	7	35	32	1
EE 	21	19	4	20	36	0
IE 	7	27	2	32	29	3
EL 	8	32	4	19	37	0
ES 	14	27	7	21	30	1
FR 	11	14	1	19	51	4
HR 	15	32	4	23	25	1
IT 	18	18	3	33	26	2
CY 	13	19	2	42	24	0
LV 	16	20	6	22	34	4
LT 	15	23	6	16	39	1
LU 	12	17	3	27	41	1
HU 	22	23	6	20	28	1
MT 	20	24	6	24	24	2
NL 	7	22	2	35	31	3
AT 	20	30	2	35	13	0
PL 	20	20	7	24	30	0
PT 	22	15	5	38	17	4
RO 	18	23	4	14	40	1
SI 	11	28	4	35	23	0
SK 	17	25	5	14	37	2
FI 	16	19	5	22	36	2
SE 	13	8	8	24	45	2

Q3\_3 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

**Administrative, clerical and service workers**

	Yes, because applicants do not have the right qualifications, skills or experience	Yes, because there are few or no applicants	Yes, for another reason	No difficulties	Not applicable	Don't know
EU27 	10	10	5	47	28	1
BE 	11	16	3	28	42	0
BG 	12	14	8	44	21	2
CZ 	9	12	5	44	30	1
DK 	6	4	1	50	38	2
DE 	10	12	5	52	20	1
EE 	7	4	2	26	60	1
IE 	5	8	3	64	15	4
EL 	15	19	8	44	14	0
ES 	10	5	7	54	23	2
FR 	12	9	3	34	41	1
HR 	14	17	6	44	19	1
IT 	8	7	4	61	19	2
CY 	5	14	6	63	13	0
LV 	9	8	8	39	33	3
LT 	6	9	6	40	39	1
LU 	14	10	8	37	30	1
HU 	10	7	5	46	32	1
MT 	19	13	9	41	18	1
NL 	12	14	6	45	22	1
AT 	8	24	4	43	21	0
PL 	9	15	6	42	28	0
PT 	4	7	2	59	24	4
RO 	8	15	5	21	51	0
SI 	4	7	4	60	24	0
SK 	12	8	8	41	30	1
FI 	8	7	4	35	46	1
SE 	6	5	2	46	39	1

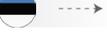
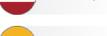
Q3\_4 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

**Machine operators, craft and skilled trades workers**

	Yes, because applicants do not have the right qualifications, skills or experience	Yes, because there are few or no applicants	Yes, for another reason	No difficulties	Not applicable	Don't know
EU27 	10	18	4	14	54	1
BE 	9	10	3	11	65	2
BG 	15	17	5	11	50	2
CZ 	11	26	4	9	48	2
DK 	7	3	1	12	75	1
DE 	12	18	3	30	37	1
EE 	16	14	3	14	52	0
IE 	9	17	0	17	56	1
EL 	8	21	2	10	59	0
ES 	11	17	3	10	58	2
FR 	8	15	1	9	66	1
HR 	11	17	2	10	57	3
IT 	12	24	5	12	47	0
CY 	9	11	3	37	40	0
LV 	10	14	6	11	57	2
LT 	13	15	5	10	58	1
LU 	11	10	3	12	64	1
HU 	9	14	3	17	57	0
MT 	10	22	7	17	42	2
NL 	9	17	3	12	58	1
AT 	7	30	1	25	37	0
PL 	11	18	9	13	48	0
PT 	14	20	7	10	46	4
RO 	11	17	3	9	59	0
SI 	8	24	2	34	33	0
SK 	11	21	3	7	57	1
FI 	14	11	2	14	58	2
SE 	9	5	2	14	68	2

Q3\_5 Does your company face difficulties in recruiting staff for the following roles? If any of the job roles do not exist in your company, please just say so.

### Manual labourers

	Yes, because applicants do not have the right qualifications, skills or experience	Yes, because there are few or no applicants	Yes, for another reason	No difficulties	Not applicable	Don't know
EU27 	13	18	4	24	40	1
BE 	14	28	6	16	35	1
BG 	13	18	7	27	34	1
CZ 	3	20	8	21	47	1
DK 	10	10	2	31	45	1
DE 	11	12	3	37	36	1
EE 	7	9	6	26	53	0
IE 	8	16	3	26	46	2
EL 	4	25	2	21	48	0
ES 	15	15	3	21	45	2
FR 	12	23	5	19	39	1
HR 	5	17	4	20	54	1
IT 	16	23	5	24	33	0
CY 	8	22	5	30	34	0
LV 	8	14	8	21	47	2
LT 	14	14	10	21	42	0
LU 	16	13	4	28	39	1
HU 	12	15	8	17	48	1
MT 	17	21	3	33	23	3
NL 	14	12	4	27	44	0
AT 	13	20	3	42	22	0
PL 	14	24	3	24	34	0
PT 	20	12	7	23	37	2
RO 	9	20	5	11	55	1
SI 	5	22	4	36	32	0
SK 	11	20	5	16	46	1
FI 	14	13	3	29	40	1
SE 	7	8	6	24	55	1

Q4\_1 Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? **Skill shortages hold your company back in general business activities**

	Totally agree	Somewhat agree	Somewhat disagree	Totally disagree	Don't know
EU27 	26	37	16	18	3
BE 	29	46	10	13	2
BG 	42	37	6	12	3
CZ 	23	41	20	11	5
DK 	22	24	15	36	3
DE 	28	33	18	18	3
EE 	17	36	18	28	1
IE 	18	45	18	18	1
EL 	40	34	13	12	1
ES 	27	35	24	14	1
FR 	33	36	12	16	3
HR 	23	47	9	20	1
IT 	23	43	17	16	1
CY 	33	17	8	41	1
LV 	28	36	17	15	5
LT 	29	30	18	21	2
LU 	19	29	7	41	6
HU 	45	28	9	15	3
MT 	17	45	18	16	4
NL 	15	44	15	23	4
AT 	13	41	19	24	3
PL 	24	36	19	17	4
PT 	16	35	17	29	4
RO 	42	35	12	9	2
SI 	28	31	9	31	1
SK 	27	36	20	13	4
FI 	20	31	18	27	5
SE 	19	29	12	35	5

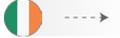
Q4\_2 Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? **Skill shortages hold your company back in greening business activities**

	Totally agree	Somewhat agree	Somewhat disagree	Totally disagree	Don't know
EU27 	12	27	24	30	7
BE 	8	23	27	35	7
BG 	16	25	11	30	18
CZ 	3	13	36	36	13
DK 	7	12	14	52	15
DE 	19	20	28	28	4
EE 	4	14	21	57	4
IE 	17	33	27	18	6
EL 	18	28	27	25	3
ES 	13	22	37	23	5
FR 	13	32	22	27	7
HR 	9	36	14	33	7
IT 	9	34	20	28	9
CY 	19	12	13	53	3
LV 	13	24	23	34	7
LT 	22	21	17	36	4
LU 	7	36	15	38	5
HU 	21	20	16	37	6
MT 	15	36	25	17	7
NL 	13	38	16	25	9
AT 	13	28	32	24	4
PL 	11	25	27	33	4
PT 	18	26	17	34	6
RO 	20	35	18	19	8
SI 	10	21	14	54	2
SK 	5	25	31	34	5
FI 	2	14	26	51	7
SE 	4	16	12	63	5

Q4\_3 Skills shortages are defined as difficulties to fill recently opened vacancies due to a lack of people with the right qualifications, skills or experience. To what extent do you agree or disagree with the following statements? **Skill shortages hold your company back in adopting and/or using digital technologies**

	Totally agree	Somewhat agree	Somewhat disagree	Totally disagree	Don't know
EU27 	16	29	25	25	5
BE 	10	32	24	26	8
BG 	35	31	8	17	8
CZ 	6	23	39	25	7
DK 	9	23	17	45	7
DE 	14	19	29	34	4
EE 	7	20	16	54	3
IE 	11	31	32	22	4
EL 	30	38	18	14	1
ES 	17	29	32	21	2
FR 	15	31	22	24	8
HR 	17	44	13	25	2
IT 	18	30	31	17	4
CY 	28	10	10	50	2
LV 	19	25	18	32	6
LT 	17	24	19	37	4
LU 	14	27	15	42	2
HU 	30	23	15	31	1
MT 	13	34	29	22	2
NL 	15	34	26	20	5
AT 	12	34	22	31	1
PL 	10	33	28	24	5
PT 	14	23	19	40	4
RO 	36	35	16	11	2
SI 	15	23	12	48	3
SK 	14	33	26	22	6
FI 	12	32	21	32	3
SE 	10	30	11	46	4

Q5 When faced with skills shortages, does your company do any of the following? Please list all the apply. [MULTIPLE ANSWERS ALLOWED]

		Invest more in candidate searches	Invest more in training	Collaborate with organisations in education or employment, or with associate or sectoral bodies	Change work processes (i.e. automate, outsource, etc.)	Abandon the business activity facing skills shortages	Adjust (or lower) hiring standards	Increase job attractiveness in terms of financial and/or non-financial benefits	Make better use of talent within the company (e.g. staff mobility, job rotation, etc.)	Other [SPONTANEOUS]	None of these [SPONTANEOUS]	Don't know/No answer
EU27		26	35	27	23	8	17	32	43	1	8	2
BE		32	34	44	24	9	22	37	42	3	6	1
BG		18	27	15	21	8	12	31	43	1	7	1
CZ		31	34	31	22	5	18	55	37	1	5	1
DK		11	22	28	21	7	13	25	37	5	12	4
DE		21	26	15	23	16	22	35	41	2	18	1
EE		13	27	24	24	9	12	37	44	0	14	1
IE		18	49	37	17	2	16	22	50	2	7	2
EL		29	28	12	27	7	22	34	64	0	3	0
ES		26	26	22	32	9	19	23	48	2	6	1
FR		29	38	35	23	9	18	30	41	1	5	2
HR		26	36	28	18	5	20	31	40	0	7	1
IT		29	47	31	24	2	13	32	54	0	7	2
CY		30	36	22	15	6	16	18	43	3	18	0
LV		11	25	22	25	7	13	29	39	1	13	2
LT		28	24	25	13	6	14	42	41	1	9	1
LU		37	34	22	29	5	20	23	30	3	12	9
HU		30	24	22	17	5	11	33	29	2	10	3
MT		29	47	32	26	2	14	21	41	1	5	3
NL		28	44	27	22	6	14	36	39	2	7	2
AT		30	30	26	31	7	16	30	45	1	9	2
PL		20	35	27	25	7	18	28	40	1	6	3
PT		27	41	22	10	0	18	17	29	0	16	5
RO		25	40	24	25	12	20	46	45	1	2	0
SI		13	29	23	18	8	11	22	46	4	7	1
SK		26	35	33	25	13	22	54	34	1	6	1
FI		24	28	34	19	9	17	25	41	1	6	1
SE		25	32	26	15	14	18	27	53	3	9	1

Q6\_1 How much effort do you think each of the following are making to support companies like yours to tackle skills challenges? **EU level organisations/authorities**

		A great deal	A fair amount	Not very much	No effort at all	Don't know
EU27		3	13	27	43	15
BE		5	10	23	49	13
BG		1	7	23	51	18
CZ		1	8	23	50	18
DK		3	5	19	49	23
DE		10	9	24	48	9
EE		2	9	18	53	18
IE		4	33	32	24	8
EL		3	17	27	41	12
ES		2	8	32	45	13
FR		4	14	20	41	22
HR		4	12	38	32	15
IT		0	15	28	44	13
CY		2	24	23	35	16
LV		5	10	13	60	12
LT		1	12	26	37	25
LU		10	9	28	34	20
HU		3	10	15	59	13
MT		5	16	33	38	7
NL		5	17	34	30	14
AT		4	8	40	42	6
PL		4	16	33	40	7
PT		4	27	29	25	15
RO		3	15	36	35	11
SI		2	19	16	49	14
SK		7	12	25	35	21
FI		0	12	16	59	14
SE		3	4	19	47	27

Q6\_2 How much effort do you think each of the following are making to support companies like yours to tackle skills challenges? **National level organisations/authorities**

		A great deal	A fair amount	Not very much	No effort at all	Don't know
EU27		6	18	33	37	8
BE		4	17	41	32	5
BG		1	5	23	63	9
CZ		2	12	32	42	12
DK		3	10	23	46	18
DE		15	11	28	41	5
EE		4	12	29	45	11
IE		17	29	35	12	7
EL		3	15	39	39	5
ES		2	4	39	51	4
FR		6	29	26	27	12
HR		3	10	44	39	5
IT		1	20	40	31	8
CY		3	20	28	37	12
LV		3	10	17	60	10
LT		1	10	36	33	19
LU		14	24	31	21	10
HU		4	12	21	54	9
MT		11	25	37	22	5
NL		9	29	35	22	5
AT		8	19	45	24	5
PL		6	20	32	39	3
PT		4	27	25	34	10
RO		1	7	41	49	2
SI		4	19	23	47	8
SK		7	14	35	34	10
FI		3	23	21	45	8
SE		2	9	35	37	17

Q6\_3 How much effort do you think each of the following are making to support companies like yours to tackle skills challenges? **Regional or local level organisations/authorities (including public employment services)**

		A great deal	A fair amount	Not very much	No effort at all	Don't know
EU27		7	21	30	34	8
BE		6	26	35	25	7
BG		1	5	31	56	7
CZ		3	14	35	38	10
DK		5	18	31	34	12
DE		20	18	25	32	5
EE		4	16	27	41	12
IE		11	36	28	18	7
EL		1	15	34	47	3
ES		3	9	40	46	3
FR		9	32	23	28	8
HR		2	14	39	41	5
IT		3	25	25	34	12
CY		6	19	28	36	11
LV		4	11	23	53	9
LT		3	17	37	30	14
LU		11	26	32	22	9
HU		4	19	22	51	4
MT		6	35	29	25	4
NL		4	29	33	26	8
AT		13	27	36	19	5
PL		6	24	30	34	6
PT		6	16	38	30	10
RO		3	9	41	45	3
SI		6	21	25	41	7
SK		7	15	35	33	11
FI		3	30	26	34	7
SE		5	15	31	35	15

Q7\_1 How familiar are you with each of the following? **EU policy initiatives for skills (such as Pact for Skills, European Alliance for Apprenticeships or the Centres of Vocational Excellence)**

		Very familiar	Moderately familiar	Slightly familiar	Not at all familiar	Don't know
EU27		3	11	20	65	2
BE		2	6	16	75	0
BG		1	12	18	69	1
CZ		1	6	12	79	2
DK		1	7	13	77	3
DE		1	6	10	77	6
EE		1	6	18	76	0
IE		2	18	12	67	2
EL		4	9	24	61	2
ES		1	7	21	70	1
FR		2	13	17	66	2
HR		3	12	30	55	1
IT		5	12	31	51	2
CY		4	14	18	63	2
LV		2	4	17	73	5
LT		5	12	22	58	2
LU		6	7	28	55	3
HU		1	15	16	67	1
MT		5	18	21	53	3
NL		8	12	26	51	3
AT		4	12	21	62	0
PL		6	19	21	53	1
PT		3	15	26	54	2
RO		2	10	23	64	2
SI		2	10	20	66	1
SK		0	3	14	82	1
FI		0	4	12	85	0
SE		1	5	10	84	0

Q7\_2 How familiar are you with each of the following? **EU funding programmes for skills (such as European Social Fund Plus or Erasmus+)**

		Very familiar	Moderately familiar	Slightly familiar	Not at all familiar	Don't know
EU27		5	17	22	54	2
BE		6	10	23	61	1
BG		7	19	20	54	1
CZ		5	20	21	53	1
DK		3	10	18	67	3
DE		3	9	13	71	5
EE		9	16	33	42	1
IE		7	12	22	55	4
EL		6	15	21	58	0
ES		7	19	27	46	1
FR		4	15	19	58	4
HR		9	27	29	33	2
IT		3	21	24	50	1
CY		5	17	24	54	1
LV		4	12	33	49	2
LT		15	20	33	31	1
LU		8	12	23	56	1
HU		7	21	17	55	1
MT		8	20	23	45	4
NL		4	17	22	55	3
AT		10	12	25	51	2
PL		6	24	21	47	2
PT		3	25	24	46	1
RO		3	19	29	47	2
SI		10	16	27	46	1
SK		8	17	43	32	0
FI		2	7	27	63	0
SE		1	8	17	74	0

Q7\_3 How familiar are you with each of the following? **EU initiatives facilitating hiring skilled workers from abroad (such as Blue Card)**

	Very familiar	Moderately familiar	Slightly familiar	Not at all familiar	Don't know
EU27 	2	9	16	70	3
BE 	3	4	14	80	0
BG 	3	10	15	70	2
CZ 	2	10	17	69	3
DK 	3	8	14	71	3
DE 	1	6	12	75	6
EE 	2	7	15	76	1
IE 	2	16	11	66	5
EL 	1	6	15	74	3
ES 	3	7	16	74	1
FR 	3	12	11	71	2
HR 	4	14	29	51	2
IT 	3	6	16	71	5
CY 	4	9	9	74	3
LV 	1	4	11	80	4
LT 	8	8	19	64	2
LU 	12	3	16	69	0
HU 	0	11	10	78	1
MT 	6	12	18	62	2
NL 	5	10	20	61	5
AT 	2	21	22	53	2
PL 	3	15	21	58	2
PT 	1	10	22	63	5
RO 	1	7	21	70	1
SI 	4	8	13	76	1
SK 	1	4	19	75	2
FI 	0	4	12	83	1
SE 	1	5	15	79	0

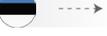
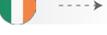
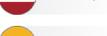
Q8\_1 How much would each of the following help your company make recruiting staff with the required skills easier? **Better tools for assessing your company's skills needs**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		18	29	21	26	5	2
BE		13	20	29	33	3	1
BG		17	27	17	26	8	6
CZ		7	26	22	37	6	2
DK		10	13	10	46	17	3
DE		13	18	24	36	6	3
EE		6	23	20	39	6	7
IE		22	34	19	21	1	3
EL		34	34	14	15	2	2
ES		19	24	27	26	2	1
FR		19	32	16	25	5	3
HR		15	43	14	18	7	3
IT		21	37	19	17	4	1
CY		35	32	16	14	1	2
LV		8	24	26	29	6	8
LT		9	31	32	20	3	5
LU		22	15	14	41	6	2
HU		16	23	13	35	9	5
MT		27	30	17	18	2	6
NL		13	35	18	24	8	2
AT		5	34	27	30	1	3
PL		19	29	24	21	6	2
PT		35	30	15	9	9	2
RO		25	38	20	15	0	2
SI		10	14	26	37	12	3
SK		11	24	32	25	4	4
FI		4	27	24	38	7	1
SE		9	16	15	55	4	2

Q8\_2 How much would each of the following help your company make recruiting staff with the required skills easier? **Better tools for assessing the skills of job applicants**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		19	29	20	25	5	2
BE		15	27	23	29	4	1
BG		21	22	15	31	10	0
CZ		7	27	19	38	7	3
DK		8	20	14	38	17	2
DE		21	19	19	32	7	2
EE		7	27	16	37	8	5
IE		22	25	25	20	3	5
EL		33	30	14	21	1	2
ES		18	21	27	30	2	2
FR		19	32	16	27	3	3
HR		25	36	16	16	4	3
IT		21	42	20	12	3	2
CY		26	41	18	13	1	1
LV		9	24	24	29	6	9
LT		13	29	31	20	3	4
LU		25	19	17	28	8	3
HU		13	22	14	39	9	3
MT		29	28	20	14	6	3
NL		19	35	20	16	7	4
AT		12	27	32	24	3	2
PL		22	30	21	21	6	0
PT		27	29	21	16	4	3
RO		30	41	13	14	1	1
SI		13	15	25	39	8	0
SK		12	30	29	21	5	4
FI		12	28	21	33	5	1
SE		15	21	20	41	3	1

Q8\_3 How much would each of the following help your company make recruiting staff with the required skills easier? **Easier procedures for recognition of foreign qualifications**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		18	21	17	35	8	2
BE		9	15	22	46	7	1
BG		18	15	13	32	17	6
CZ		11	16	16	45	11	1
DK		10	13	9	30	33	5
DE		29	14	16	32	8	2
EE		4	21	13	36	22	4
IE		20	38	14	18	6	3
EL		31	27	12	28	2	0
ES		19	11	21	42	4	3
FR		22	20	18	33	5	2
HR		21	25	10	25	15	4
IT		10	30	16	38	6	0
CY		29	27	15	22	6	2
LV		9	15	15	40	13	9
LT		14	22	25	31	5	4
LU		34	16	16	24	4	6
HU		9	15	11	45	17	3
MT		20	31	18	25	7	0
NL		18	29	16	27	10	1
AT		14	34	20	28	5	1
PL		18	22	19	31	10	0
PT		22	23	17	29	9	0
RO		34	26	12	23	4	1
SI		18	11	15	37	17	2
SK		20	22	17	31	8	3
FI		7	11	10	60	8	4
SE		17	17	13	39	11	2

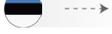
Q8\_4 How much would each of the following help your company make recruiting staff with the required skills easier? **Easier procedures for hiring workers from outside the EU**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		18	20	14	37	9	2
BE		12	10	15	53	10	1
BG		14	12	12	42	17	4
CZ		15	12	11	50	10	2
DK		14	8	8	32	33	5
DE		22	13	15	39	8	3
EE		8	11	11	42	24	3
IE		17	37	12	25	5	5
EL		20	24	11	39	3	2
ES		20	16	15	41	6	3
FR		18	22	14	38	5	2
HR		17	16	15	28	23	2
IT		15	28	13	38	6	1
CY		25	19	12	39	5	1
LV		12	13	10	42	15	9
LT		21	16	18	34	8	3
LU		22	21	14	30	9	5
HU		7	10	4	61	14	5
MT		22	23	19	24	8	4
NL		20	28	17	29	6	1
AT		22	23	18	28	5	3
PL		23	19	15	26	16	1
PT		19	23	23	23	11	2
RO		23	26	19	28	3	1
SI		20	10	14	39	17	1
SK		17	18	14	40	8	3
FI		12	13	15	44	13	3
SE		14	13	10	50	9	4

Q8\_5 How much would each of the following help your company make recruiting staff with the required skills easier? **Easier procedures for employing remote workers living abroad**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		13	13	11	47	14	2
BE		4	7	12	60	16	2
BG		8	8	7	34	40	3
CZ		8	13	6	57	13	3
DK		4	8	3	27	56	3
DE		15	12	13	46	12	3
EE		5	15	9	33	33	4
IE		17	24	12	28	20	0
EL		14	15	11	49	11	0
ES		15	10	11	53	9	3
FR		15	9	8	54	11	3
HR		11	19	10	31	27	3
IT		10	15	9	55	11	0
CY		16	12	7	50	15	0
LV		6	8	10	45	24	7
LT		12	17	13	44	14	1
LU		32	14	8	33	12	1
HU		2	9	6	59	20	4
MT		18	16	18	38	11	0
NL		16	18	12	32	18	4
AT		8	25	18	43	1	5
PL		18	11	13	39	18	1
PT		24	14	16	32	12	2
RO		14	23	13	40	10	1
SI		8	5	10	39	38	0
SK		11	13	12	46	15	4
FI		5	9	6	52	26	2
SE		9	15	9	50	16	1

Q8\_6 How much would each of the following help your company make recruiting staff with the required skills easier? **Better collaboration with public employment services**

		Would help a lot	Would help moderately	Would help slightly	Would not help at all	Not applicable	Don't know
EU27		31	26	19	18	4	2
BE		27	27	22	21	3	1
BG		22	32	13	27	6	1
CZ		11	32	24	27	5	1
DK		15	30	11	29	12	3
DE		31	15	19	30	5	2
EE		12	29	22	29	4	4
IE		31	31	13	18	2	6
EL		48	27	12	12	1	0
ES		42	16	24	15	2	1
FR		35	28	18	13	3	2
HR		33	33	11	17	2	3
IT		35	33	13	16	2	1
CY		40	30	12	17	1	0
LV		10	25	25	31	6	4
LT		21	26	27	22	2	3
LU		43	23	9	17	5	4
HU		29	18	14	29	8	3
MT		28	31	24	17	0	0
NL		28	32	16	13	8	4
AT		25	34	28	11	1	1
PL		30	27	21	17	6	0
PT		32	24	22	10	11	0
RO		36	35	15	12	1	1
SI		23	19	26	24	6	1
SK		30	29	20	16	3	3
FI		15	36	21	26	2	1
SE		15	25	23	30	5	2

## Q9 Which of the following statements is closest to your opinion?

	Companies should be the ones responsible for covering the costs of job-related staff training	Workers themselves should be the ones responsible for covering the costs of job-related training	Companies and workers should share the costs of job-related training	Don't know
EU27 	50	5	42	4
BE 	40	8	46	6
BG 	58	6	34	2
CZ 	53	4	42	1
DK 	60	2	33	5
DE 	50	9	34	7
EE 	50	6	43	1
IE 	68	4	28	0
EL 	50	8	40	2
ES 	48	6	42	4
FR 	42	4	51	4
HR 	54	4	40	2
IT 	64	3	29	3
CY 	54	9	33	4
LV 	38	4	56	1
LT 	46	5	48	1
LU 	49	7	35	8
HU 	30	9	54	7
MT 	56	3	39	3
NL 	51	4	42	2
AT 	46	5	48	1
PL 	49	4	45	2
PT 	44	4	47	5
RO 	39	7	53	2
SI 	59	2	35	5
SK 	25	6	67	2
FI 	55	4	37	4
SE 	63	5	31	2

Q10 When recruiting workers in your company, how important are educational qualifications (degrees, diplomas, certificates acquired)?

		Very important	Moderately important	Slightly important	Not at all important	Don't know
EU27		29	37	18	15	1
BE		25	30	25	18	1
BG		29	42	22	6	1
CZ		14	20	15	52	0
DK		29	25	33	13	0
DE		34	29	19	16	1
EE		30	35	24	12	0
IE		49	31	7	13	0
EL		39	44	11	6	0
ES		29	33	21	16	1
FR		28	42	15	15	0
HR		41	44	11	5	0
IT		27	47	15	10	2
CY		40	33	18	10	0
LV		34	45	13	8	0
LT		28	36	16	19	0
LU		38	25	23	15	0
HU		41	39	11	8	2
MT		37	32	20	11	0
NL		28	34	21	16	0
AT		22	48	20	10	0
PL		33	37	18	12	0
PT		25	46	19	10	0
RO		25	38	28	8	1
SI		27	32	22	19	1
SK		29	26	25	19	0
FI		17	36	29	17	1
SE		32	29	19	19	2

Q11 Has your company recently recruited anyone from outside the European Union (i.e. not a national nor a resident in any of the EU Member States)?

		Yes, for coming to work in-person within the EU	Yes, for working remotely from outside the EU	Yes, both for work within the EU and from outside the EU	No	Don't know
EU27		10	2	2	87	1
BE		9	1	1	89	1
BG		3	0	0	97	0
CZ		6	0	1	92	0
DK		6	1	1	92	1
DE		13	1	4	80	2
EE		4	1	2	94	0
IE		25	1	2	67	5
EL		7	1	0	92	0
ES		4	0	1	95	0
FR		14	1	1	83	1
HR		4	0	1	95	0
IT		2	2	2	93	1
CY		11	0	2	86	0
LV		6	0	2	90	2
LT		7	2	1	90	0
LU		7	0	1	91	2
HU		1	1	0	98	0
MT		16	3	6	76	0
NL		19	3	2	75	1
AT		13	2	5	81	0
PL		13	3	4	80	0
PT		25	5	0	70	0
RO		2	1	1	97	0
SI		8	0	5	87	1
SK		4	1	2	93	0
FI		3	1	2	94	0
SE		7	1	0	92	0

Q12a How would you describe the hiring process of this recent recruit (or recruits) from outside the European Union?

		Very difficult	Moderately difficult	Slightly difficult	Not at all difficult	Don't know
EU27		20	32	17	26	5
BE		15	24	18	41	2
BG		59	8	3	20	10
CZ		19	29	20	32	0
DK		24	30	15	30	1
DE		43	19	18	12	9
EE		15	44	17	22	2
IE		12	42	11	32	4
EL		16	27	24	34	0
ES		35	10	24	30	2
FR		7	38	13	34	8
HR		51	34	2	11	1
IT		10	34	18	34	5
CY		44	5	15	36	0
LV		20	35	13	31	1
LT		46	19	20	16	0
LU		14	15	2	70	0
HU		4	46	34	16	0
MT		13	41	18	29	0
NL		14	37	18	26	5
AT		24	47	22	8	0
PL		27	33	19	22	0
PT		7	44	15	26	7
RO		49	14	7	29	1
SI		45	31	14	11	0
SK		11	36	10	43	0
FI		5	17	2	62	14
SE		20	13	10	52	6

## Q12b What are the main reasons for not recruiting anyone from outside the European Union? [MULTIPLE ANSWERS ALLOWED]

		Company did not recruit anyone recently	Sufficient number of candidates are available within the European Union	No appropriate candidates from outside the European Union	Due to the expected complexity (length, cost, uncertainty, etc.) of international recruitment and migration procedures	Due to specific language skills required	No experience in hiring from outside the European Union	Lack of institutional support and guidance for international recruitment procedures	Uncertainty about the authenticity and comparability of foreign qualifications	Other [SPONTANEOUS]	None of these [SPONTANEOUS]	Don't know
EU27		37	22	18	17	25	25	12	11	8	7	2
BE		33	43	24	19	43	39	13	12	7	3	0
BG		32	10	9	19	21	11	8	6	10	14	2
CZ		49	18	26	27	41	22	13	18	2	5	1
DK		40	28	12	8	33	23	3	5	10	3	1
DE		36	15	21	12	29	23	9	10	6	16	5
EE		53	21	8	19	32	25	5	16	9	6	0
IE		34	29	12	15	17	17	12	0	1	13	5
EL		32	30	21	25	21	25	13	10	3	4	0
ES		42	24	10	20	20	26	14	11	10	8	0
FR		26	22	29	15	23	23	9	10	10	4	2
HR		37	27	12	11	28	32	6	9	5	6	1
IT		29	28	16	20	24	34	19	12	8	8	2
CY		40	18	11	12	16	12	5	6	9	21	0
LV		48	14	6	10	19	21	5	10	5	13	1
LT		57	14	4	11	22	25	7	7	2	2	1
LU		23	11	14	15	34	18	22	13	10	18	6
HU		48	25	22	4	22	22	3	6	11	4	1
MT		32	24	19	15	22	22	21	15	6	5	1
NL		33	27	13	17	22	23	11	12	9	9	5
AT		41	12	27	21	32	18	14	15	10	5	3
PL		40	16	20	15	23	23	19	12	4	7	4
PT		35	2	8	9	12	8	11	15	12	10	3
RO		52	22	15	27	32	27	15	18	4	4	0
SI		52	15	6	18	29	26	6	6	6	3	0
SK		56	18	11	17	25	38	18	14	5	5	1
FI		45	22	10	9	38	29	5	4	2	7	0
SE		41	32	11	16	35	28	6	16	11	3	1



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