



ANALYTICAL HIGHLIGHT

FOCUS ON

Health sector

- Health is forecast to be a growth sector, with a **net increase of 1.8 million jobs** across the EU between 2013 and 2025. This will mainly be in occupations not related to medicine per se.
- Over half of current health employees in the European Union is anticipated to retire or leave the sector for another reason, leading to a **total 11.6 million job openings**, a higher number than in any other sector.
- Changes in how health services are delivered to meet the needs of Europe's ageing population and to reflect greater specialism are leading to the **creation of new job roles** and the **up-skilling** of existing health occupations.

Defining the health sector

The health sector encompasses activities in hospitals, general and specialist medical practices, health clinics, medical laboratories, as well as dentistry. It comprises workers primarily delivering healthcare services such as health professionals (doctors, nurses, midwives, paramedics, pharmacists and dentists), health associate professionals, public health professionals, health management and administrative and support staff.

Many people also work indirectly for the healthcare sector, such as those employed in the healthcare industries and support services, pharmaceutical, medical device industries, health insurance, health research, e-Health and occupational health¹.

A major source of job openings

The health sector is a major employer across the EU, estimated to represent nearly 10% of all employment in 2013 (see Table 1). Health sector employment is expected to grow at much faster rate (+8.1%) than overall EU employment (+3.3%) from 2013 to 2025. This continues the trend seen over the last decade. Compared to other sectors, the health sector has been relatively resilient in the face of the global economic

downturn – reflecting increased demand for health service provision as a consequence of Europe's ageing population.

Accounting for the need to replace employees leaving the sector due to retirement or for other reasons, there are more job openings in health than any other sector (11.6 million, compared to 7.9 million in the next largest sector – retailing). This represents 52% of the estimated number of EU health employees in 2013.

Widespread growth across most EU countries

Most EU countries are forecast to have a net increase in the number of health jobs from 2013 to 2025. Figure 1 shows the estimated percentage increase in health sector employment across the EU-28 over this period. In absolute terms, over 300,000 new jobs are expected to be created in France, Italy and the United Kingdom.

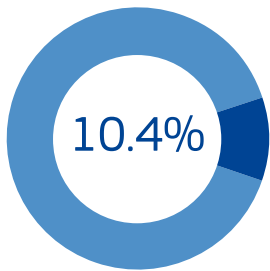
While the growth of the sector is much smaller in Germany, it has the largest number of total job openings (2 million), reflecting substantial replacement needs. There are just under 2 million job openings in France, a forecast 1.7 million job openings in the United Kingdom and 1 million jobs to be filled in Italy.

▼ Table 1 – EU-28 medium-term employment forecast 2013 to 2025

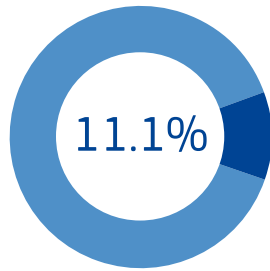
	Employment levels		% change	2013-2025		
	2013	2025	2013-2025	Change in total employment (jobs created/lost)	Replacement needs	Total number of job openings
Health and social work	22,206,000	24,009,000	8.1	1,802,000	9,759,000	11,561,000
All sectors	223,763,000	231,241,000	3.3	7,598,000	96,623,000	104,221,000

Source: Cedefop (2014)

▼ Health and social work share of total employment, 2025



▼ Health and social work share of total job openings, 2025



In a number of other countries, there is a substantial task to replace workers who retire or leave the sector for other reasons. The anticipated number of job openings represents more than three quarters of the estimated 2013 health sector in Denmark, Estonia, Hungary, Latvia and Sweden.

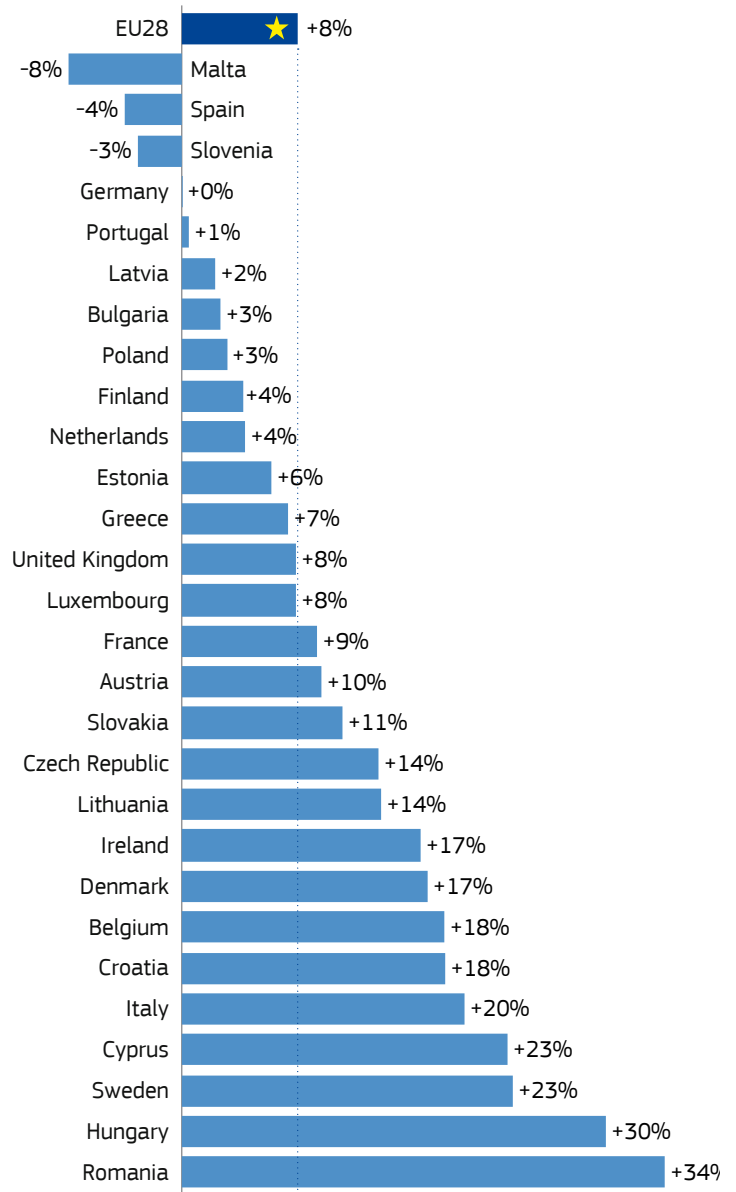
A changing occupational pattern and risk of shortages

Health sector employment is substantially concentrated in (and evenly distributed between) three of the major occupational groups: professionals; technicians and associate professionals; and service and sales workers. Four out of five health sector employees fit into these occupational groups. Over the next decade, it is anticipated that a considerable number of the new jobs created in the health sector will be in other occupational groups, both in terms of elementary occupations (notably cleaners) and the manager group (notably administrative and commercial managers) – see Table 2.

These changes are part of an occupational shift in the health sector in which employment in the main health professional (e.g. doctors, nurses, midwives) and associate professional occupations (e.g. medical and pharmaceutical technicians) will remain flat or decline slightly, but in which there will be increased demand for business, administration and ICT professionals and associate professionals.

Even though the single largest growth occupation (cleaners) is at the elementary end of the scale, the overall pattern of change is towards an increased number of jobs requiring high- and medium-level qualifications. There will be substantial growth in the number of jobs in the health sector requiring high-level qualifications (+1.67 million) and medium-level qualifications (+753,000), alongside a decline in the number of jobs requiring low-level qualifications (-627,000). The forecast growth in medium-level jobs in health is more than twice the average rate (7.8% in health compared to 3.4% for all sectors).

▼ Figure 1 – Forecast percentage change in health sector employment by EU-28 country, 2013-2025



The occupations most at risk of experiencing shortages are the high-skilled professions, which, while not anticipated to grow in size, face a critical need to replace employees leaving the sector due to retirement or for other reasons. It is estimated that there will be a shortfall of 1 million health workers by 2020 across the EU². The most acute shortages in the supply of healthcare professionals will be in nursing, at 590,000 jobs, with physicians at 230,000 jobs and dentists, pharmacists and physiotherapists at 150,000 jobs.

Source: Cedefop (2014)

▼ Table 2 – EU-28 top 5 employment growth occupations in health 2013-2025

Occupation	Employment levels		% change	2013-2025
	2013	2025	2013-2025	Jobs created
Cleaners, refuse, street and related service occupations	1,427,000	2,024,000	41.8	597,000
Business and other professionals	1,126,000	1,505,000	33.6	379,000
Legal, social, cultural and related associate professionals	958,000	1,302,000	35.9	344,000
Business and administration associate professionals	793,000	1,002,000	26.3	209,000
Administrative and commercial managers	147,000	285,000	94.1	138,000

Source: Cedefop (2014)

New ways of delivering health care leads to new roles and skills requirements

The organisation and delivery of healthcare services is undergoing major change in many countries, and this is impacting on the nature of skills demand in the sector. This includes:

- The development of new integrated care delivery models. There is a concerted shift from care in hospitals to the delivery of primary care closer to, and in the home, especially to cope with patients with (multiple) chronic conditions, such as heart disease and diabetes. These emerging models of care delivery require different skill mixes and new ways of working, notably leading to increased delivery of health services via wider interdisciplinary teams. This puts a new onus on communication skills, leadership and management.
- The growth of new technologies, including the expansion of e-health, which enables distance diagnostics services based on new medical appliances and diagnostic techniques. This requires professional technical expertise in addition to clinical knowledge. Distance diagnostics also requires doctors to work beyond the boundaries of face-to-face counselling, creating new ways of communicating with patients and associated skill needs.

Other competencies that are generally – and increasingly – associated with the sector include the need for communication skills in non-native languages, capacity to deal with physical and mental stress, ability to empathise with patients and ability to work as part of a multi-disciplinary team^{3, 4}.

The growing requirements for technical and e-skills are impacting on job roles across the sector. For example, the operation of e-health systems such as tele-monitoring for nurses or tele-radiology will change work patterns and open new job opportunities in the healthcare sector, including the need for ICT specialists. Ultimately, the sector is facing a significant challenge in ensuring that training and education systems incorporate the necessary mix of clinical and specialist skills, along with technical expertise in order to support individuals to work effectively within this changing environment.

The increasing deployment of cross-specialist teams has been used in many countries as a way of meeting increased demand for health services at a time of difficult economic pressures and to reflect increased specialisation, for example, among doctors. This has led in some countries to new health roles being developed and existing roles being up-skilled to deal with some of the more routine tasks that doctors would traditionally

undertake. For example, in Belgium, it has been noted that nurses in future will increasingly take over some general tasks from doctors. Furthermore, pharmacists gain in importance given their frontline role in engaging the population⁵. In the UK, nursing has become increasingly professionalised with new entrants required to have undertaken degree-level study. New roles such as nurse prescribers and nurse consultants have also been introduced to streamline the management of both minor illnesses and long-term conditions⁶. This has also been associated with growth in ancillary occupations in health, such as the healthcare assistant.

Increased specialisation in health occupations also creates new jobs and skill priorities. This is most generally noted in terms of demand for geriatric specialist doctors, nurses, as well as occupations such as podiatrists. In some countries, previous shortages in the number of specialist doctors are being addressed by an increased volume of graduates, such as in Belgium⁷. In other countries, such as Ireland, skills shortages persist in specialist health roles, although more typically in specialist nursing roles⁸. There still issues relating to high drop-out rates of people undertaking medical studies given their long duration (reported, for example, in Lithuania to equate to 20% of all students starting medical studies and 15% of midwifery students). Part of what accentuates skills shortages in nursing-related professions in some EU countries is labour mobility. For example, among the approximately 46,000 registered nurses in Slovakia, it is thought that around 20,000 work abroad⁹. ■

- 1 Alcimed (2010), Study on healthcare services, sectors and products in Europe for the European Commission, Final Report
- 2 European Observatory on Health Systems and Policies (2010), Investing in Europe's health workforce of tomorrow: scope for innovation and collaboration
- 3 AMS Skills Barometer Austria (2013)
- 4 Hakala, R, Tahvanainen, S & Virtanen, K. Finland (2012). Sosiaali-, terveys-, sekä kuntoutus- ja liikunta-alan osaamistarpeiden ennakointi. Synteesi 2006-2012 tehdyistä ennakoitiselvityksistä
- 5 Fédération des maisons médicales (2012), Les métiers de demain de la première ligne de soins
- 6 Royal College of Nursing (2012), RCN factsheet: Nurse prescribing in the UK
- 7 Service Public Fédéral (2013) La planification de l'offre médicale en Belgique – Rapport annuel 2012 de la Commission de planification
- 8 FÁS (2013), National skills bulletin Ireland
- 9 National Health Information Centre (2012), Health statistics yearbook of the Slovak Republic 2011



Please quote this Analytical Highlight as:
EU Skills Panorama (2014) Health sector Analytical Highlight,
 prepared by ICF GHK and Cedefop for the European Commission