SEEDIG 2019 SURVEY

READINESS FOR THE FUTURE OF WORK IN SEE+

Conducted in preparation for the 5th SEEDIG annual meeting
7-8 May 2019 | Bucharest

ABOUT THE SURVEY

The purpose of this survey was to try to capture the perception of the Internet community in South Eastern Europe and the neighbouring area (SEE) on aspects related to the **future of work** in the context of the **fourth industrial revolution**, and the region's **readiness** for it.

It covers topics such as the region's readiness for the digital economy, digital **skills**, integration of **artificial intelligence** in daily work, and data-driven technologies in the **labour market**.

The survey was conducted online in April 2019, by the South Eastern European Dialogue on Internet Governance (SEEDIG). The results served as input into the SEEDIG 5 annual meeting, held on 7–8 May 2019, in Bucharest, Romania.

KEY FINDINGS (1)

Countries in the SEE+ region have a **positive attitude** towards the fourth industrial revolution and the impact of advanced technologies such as Artificial Intelligence (AI), automation and robotics in the economy.

According to more than half of the respondents, there will be a **balance between jobs lost and jobs gained** as a result of the impact of such technologies. 53% believe that technology will augment human performance, while 21% think that technology will replace humans in jobs.

More than half of the respondents feel confident in their **adaptability** to the changes that advanced technologies will bring to the world of work and a quarter of the respondents expects new career possibilities from such changes.

The majority of respondents declared to be comfortable with **AI being integrated in the workplace** if AI would simplify time-consuming and repetitive tasks, giving them time to execute on other tasks or alocate time more efficiently (63%). Only 12% responded that they would prefer to keep AI out of their work.

KEY FINDINGS (2)

Among the most important **digital skills and competencies** needed for the future of work, most respondents indicated creative thinking and innovation, digital skills, adaptability, problem-solving, and science, technology, engineering, and mathematical (STEM) skills.

Out of these, **STEM skills** stand out as the least known skills among respondents of the SEE+ region, with only 24% of the respondents noted having them. Skills perceived as most common are communication and collaboration (66%), digital skills (63%), problem-solving skills (61%), next to adaptability, creative thinking and innovation at equal stances (56%).

Half of the respondents ‘somewhat agree’ that the skills they have now will not keep them safe in the future labour market. Only a few (3%) indicated the opposite. A significant portion believe they will have to keep improving their current skills and **develop new skills** to remain employable. However, more than half expressed uncertainty about where and how to start improving their digital skills.

KEY FINDINGS (3)

The governments are believed to carry the highest responsibility of ensuring that the current workforce can adapt itself to the changing world of work (43%). Sharing this **responsibility to adapt** is the workforce itself (53%) by improving their skills or developing new ones.

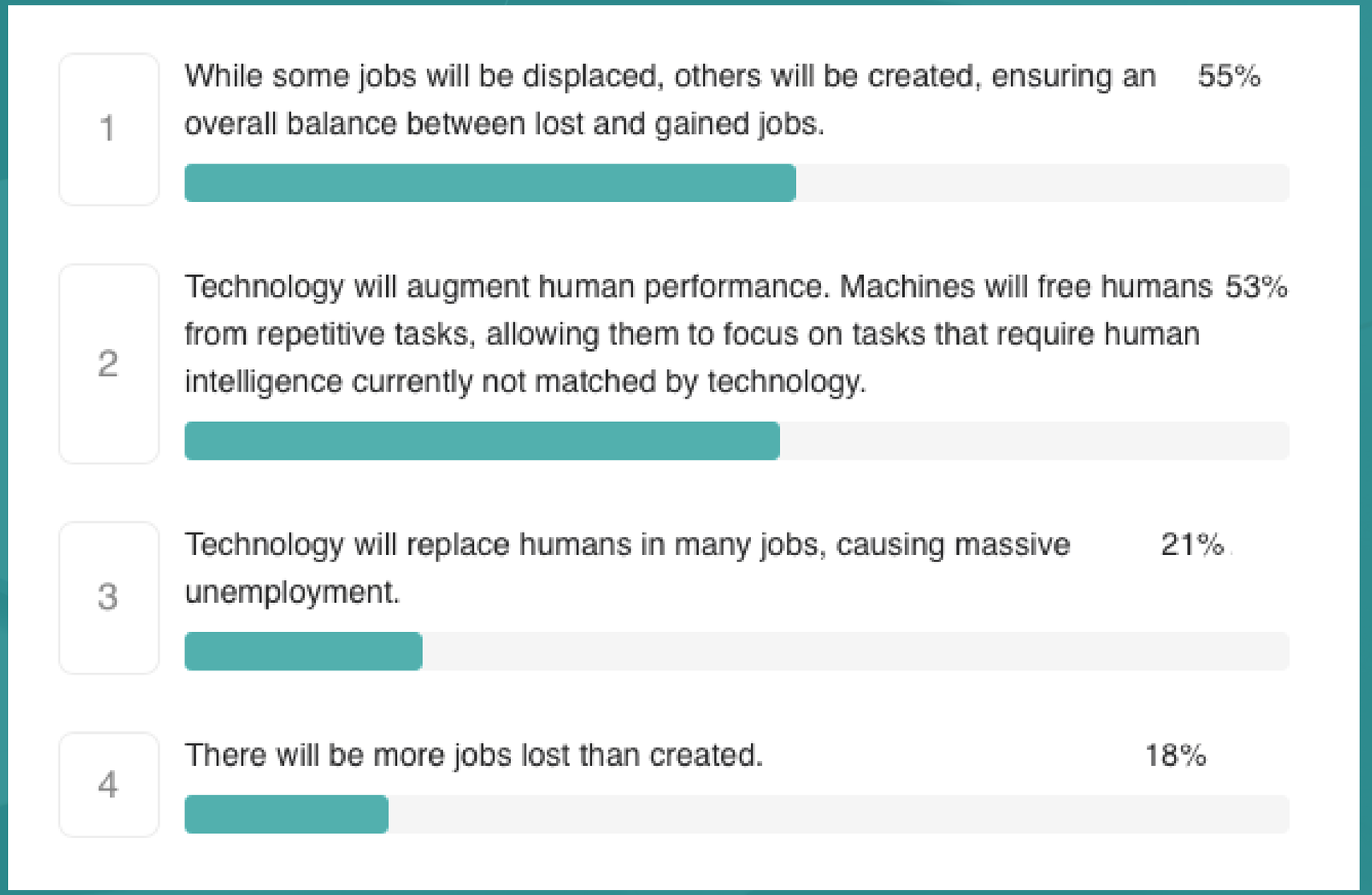
The majority of the respondents (55%) believe the **educational system** in their country is ‘not at all’ suitable for preparing children for the jobs of tomorrow.

One of the **biggest issues** countries of the SEE+ region are facing according to the respondents is specialists in digital technologies leaving the country in search for better opportunities (73%) abroad. Yet, less respondents (49%) perceive a shortage of specialists in the field of digital technologies in their country.

The **potential measures** for governments to mitigate the possible negative effects of technological progress on employment such as working together with the industry to offer upskilling and reskilling opportunities to workers (54%) and supporting new economic sectors focused on soft skills (40%).

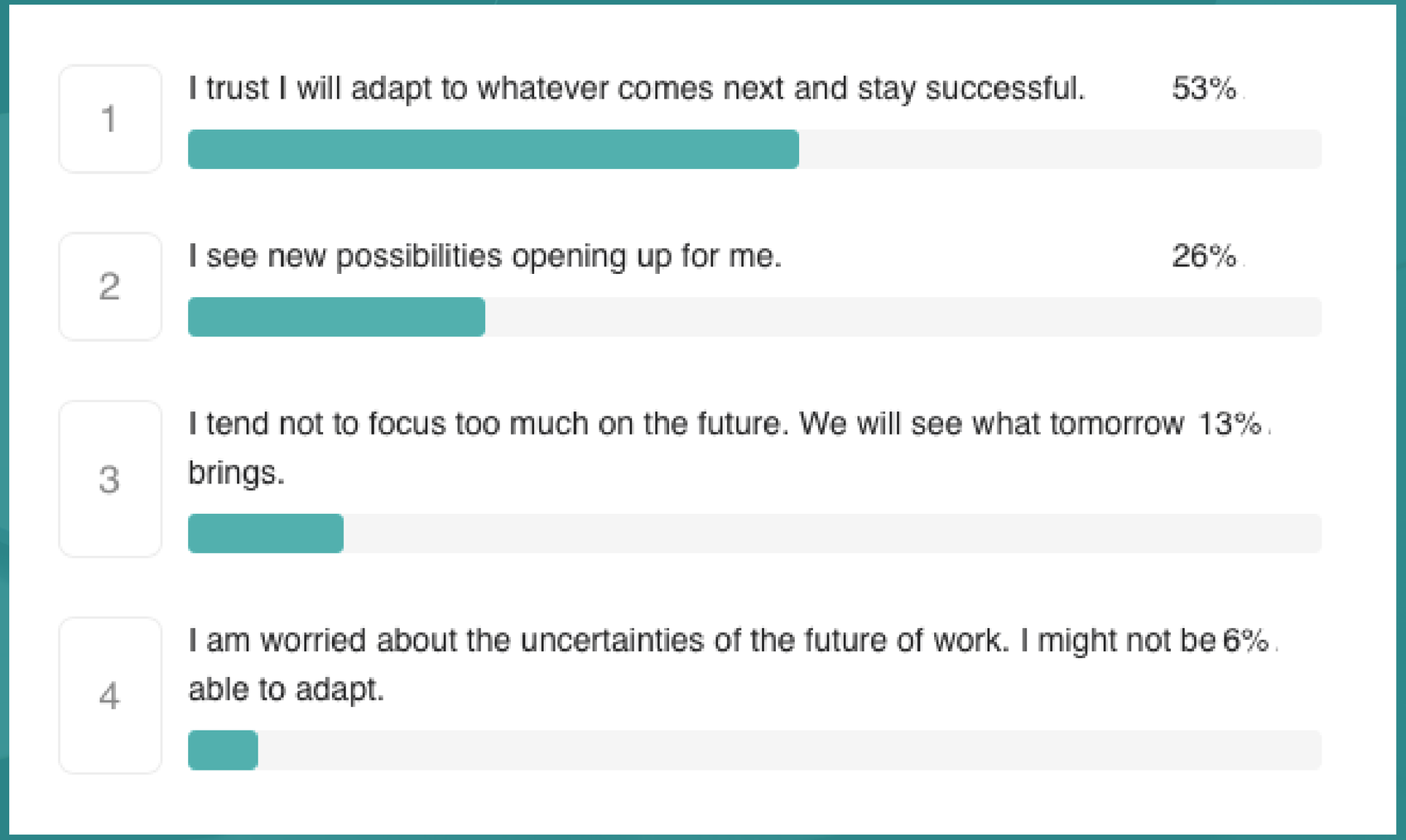
1.
THE FOURTH INDUSTRIAL REVOLUTION IS CHARACTERISED, AMONG OTHERS, BY AN ACCELERATED INTEGRATION OF ADVANCED TECHNOLOGIES SUCH AS ARTIFICIAL INTELLIGENCE (AI), AUTOMATION AND ROBOTICS INTO DIFFERENT SECTORS OF THE ECONOMY.

WHICH OF THE FOLLOWING STATEMENTS DO YOU AGREE WITH?

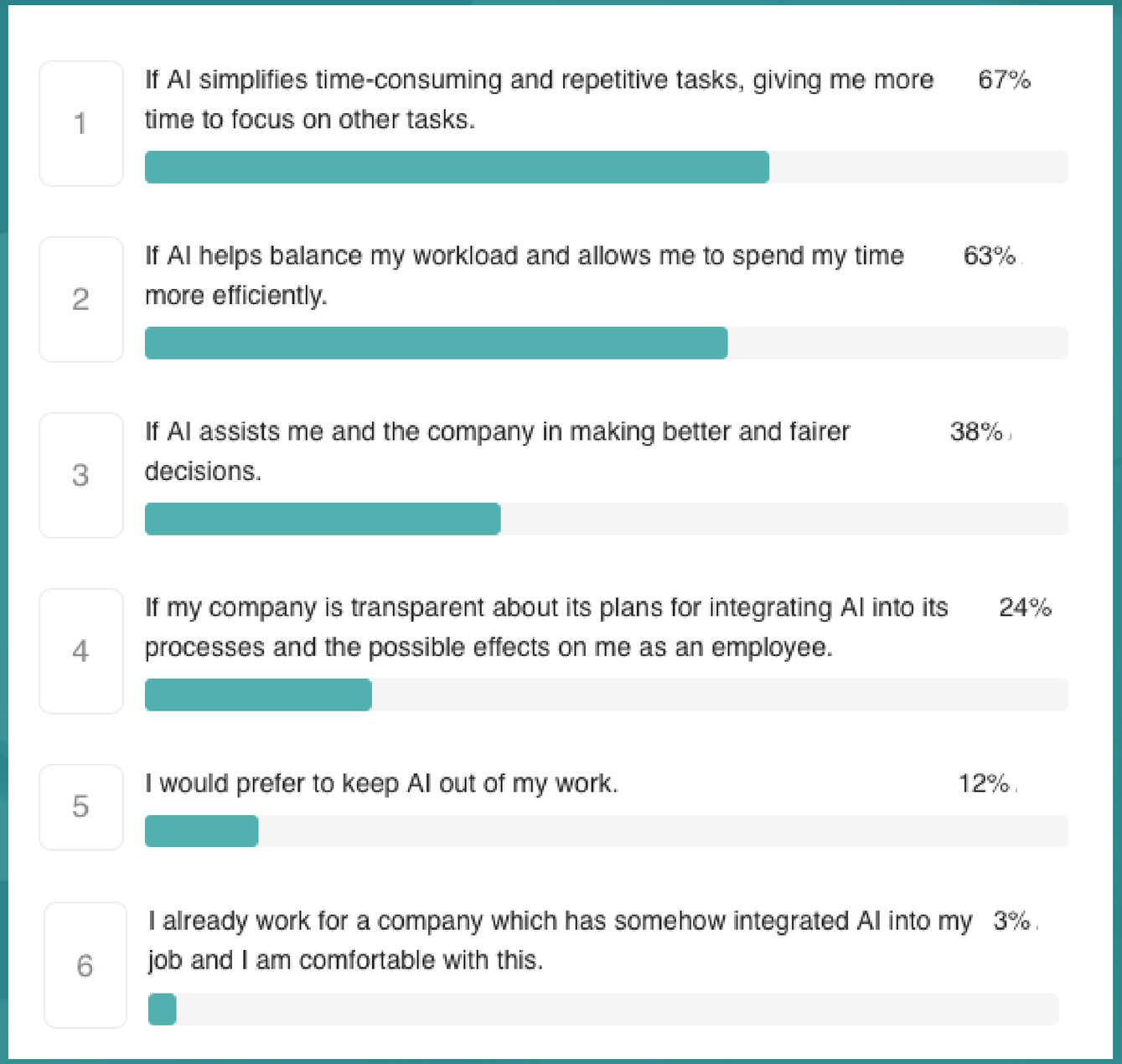


2.
LIKE ITS PREDECESSORS, THE FOURTH INDUSTRIAL REVOLUTION COMES WITH NEW/ADVANCED TECHNOLOGIES WHICH WILL BRING CHANGES TO THE WORLD OF WORK.

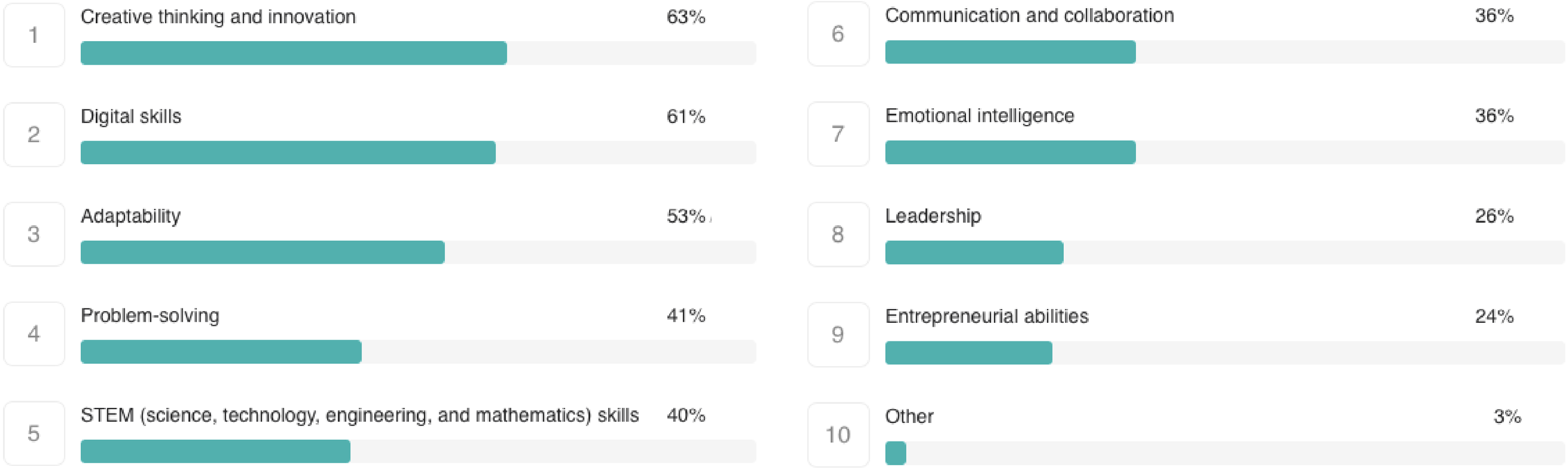
HOW DO YOU FEEL ABOUT THE POTENTIAL IMPACT OF THESE TECHNOLOGIES ON YOUR WORK/CAREER?



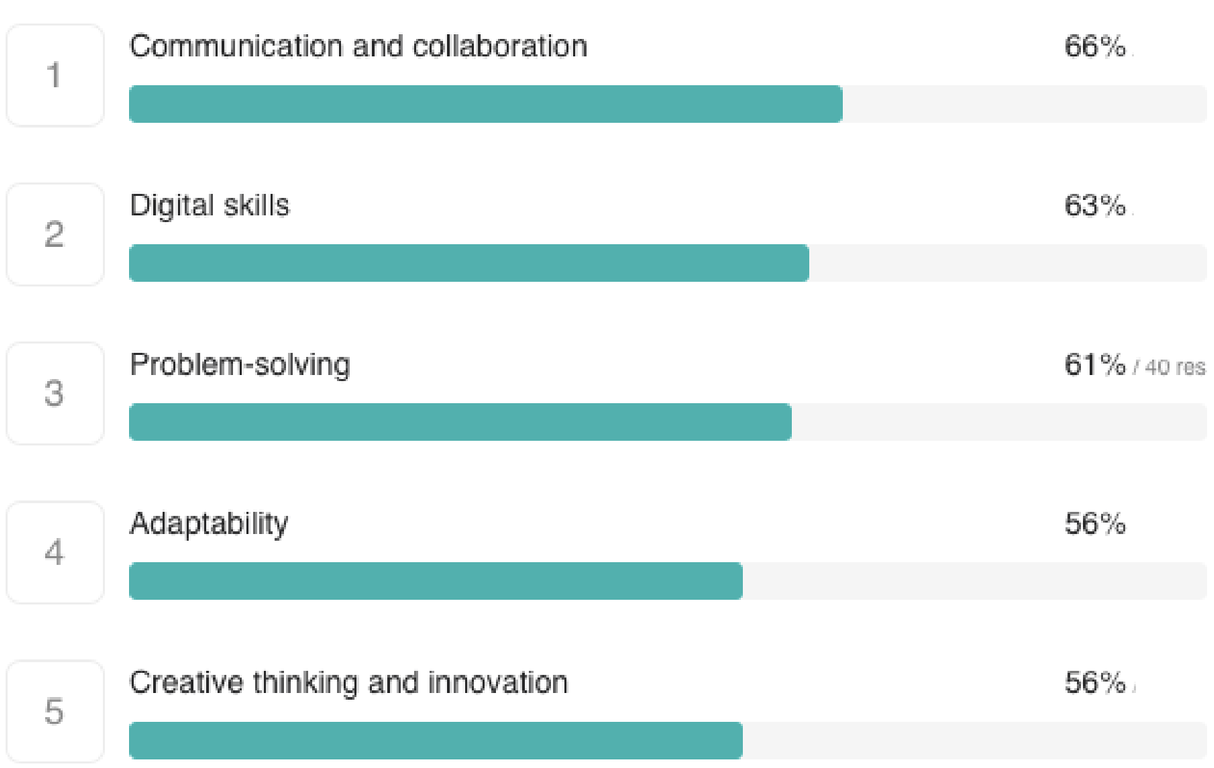
3.
UNDER WHAT CIRCUMSTANCES WOULD YOU BE COMFORTABLE WITH AI BEING INTEGRATED INTO YOUR JOB?

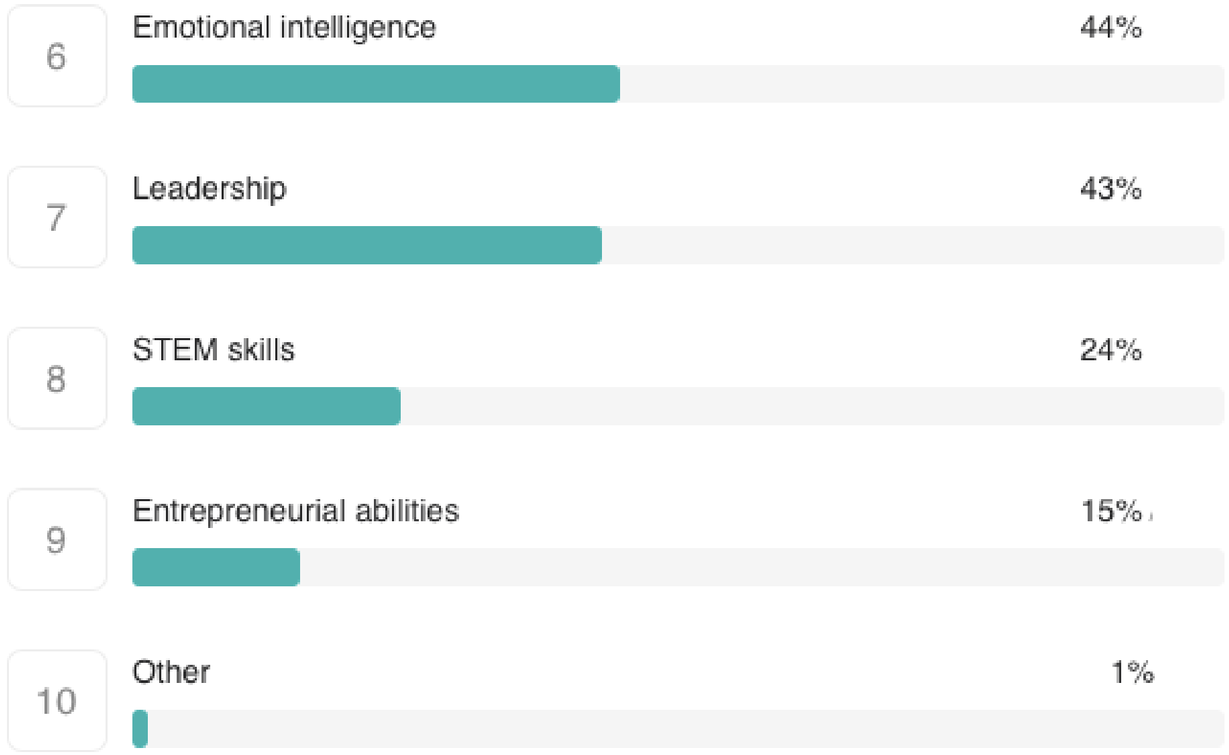


4. THINKING OF THE FUTURE OF WORK IN THE CONTEXT OF THE FOURTH INDUSTRIAL REVOLUTION, WHICH OF THE FOLLOWING SKILLS AND COMPETENCIES DO YOU FEEL WILL BE THE MOST IMPORTANT?



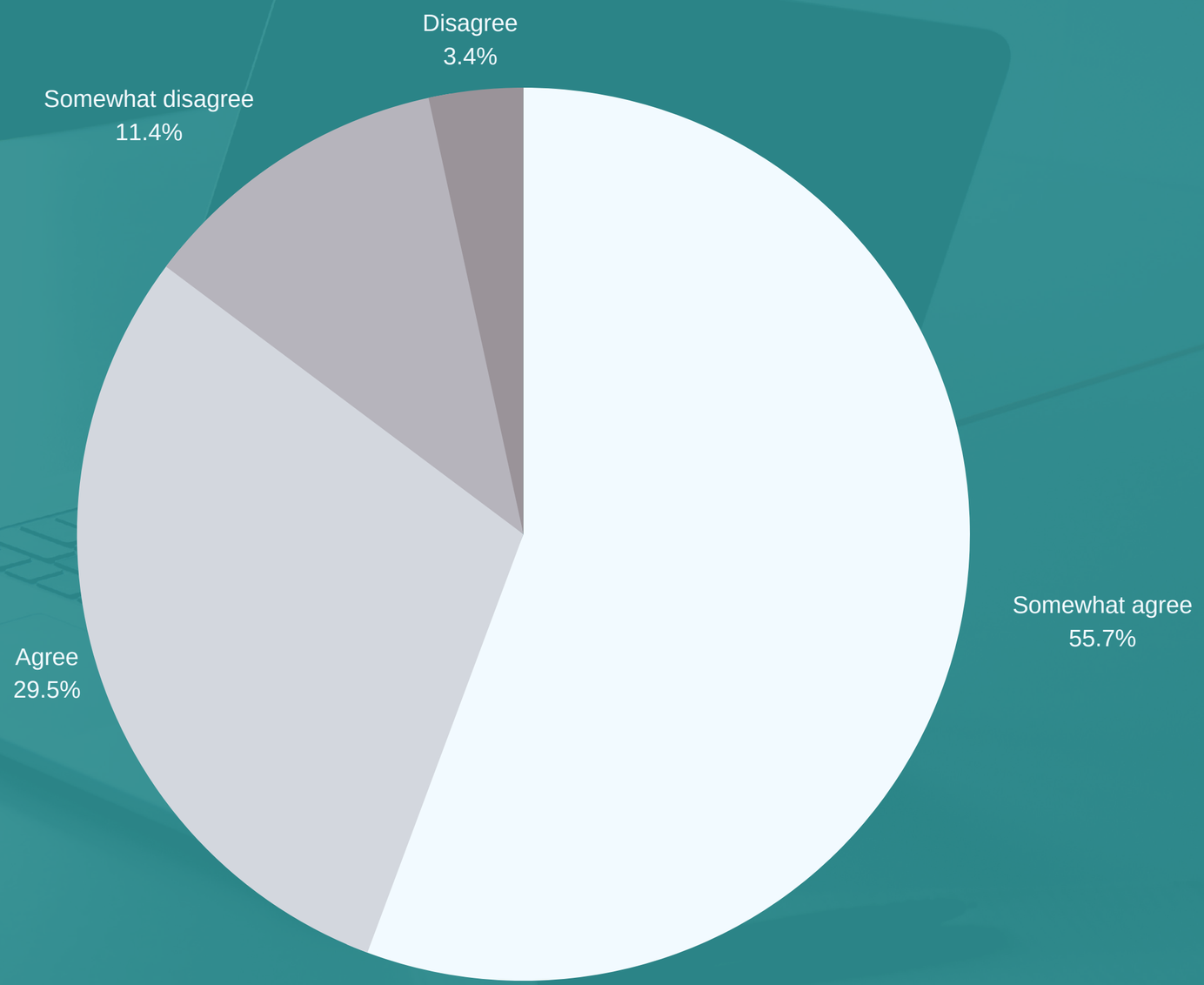
5. WHICH OF THE FOLLOWING SKILLS AND COMPETENCIES DO YOU THINK YOU CURRENTLY HAVE?





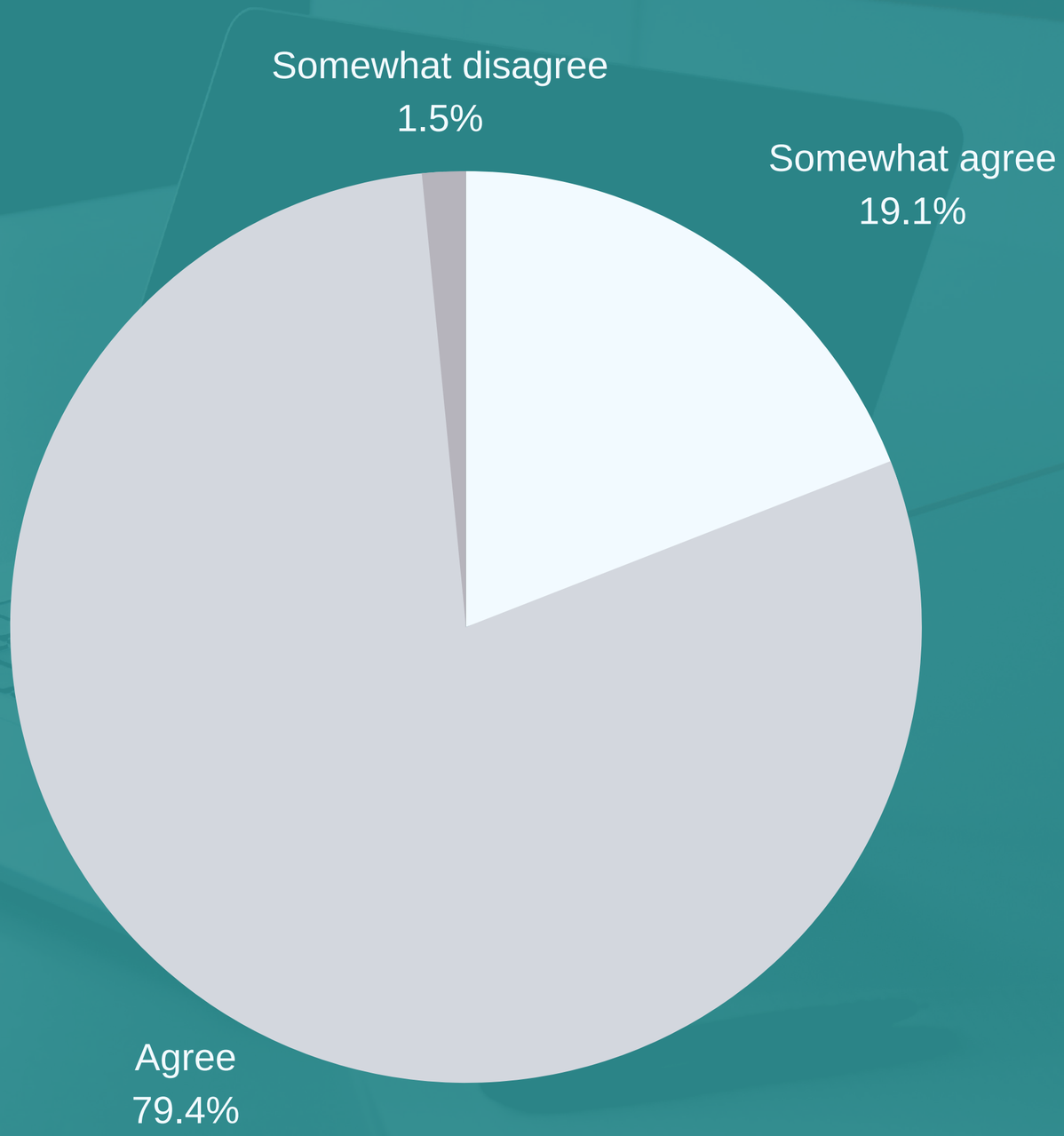
6. TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

6.A
THE SKILLS I HAVE NOW WILL KEEP ME SAFE IN THE FUTURE WORLD OF WORK.



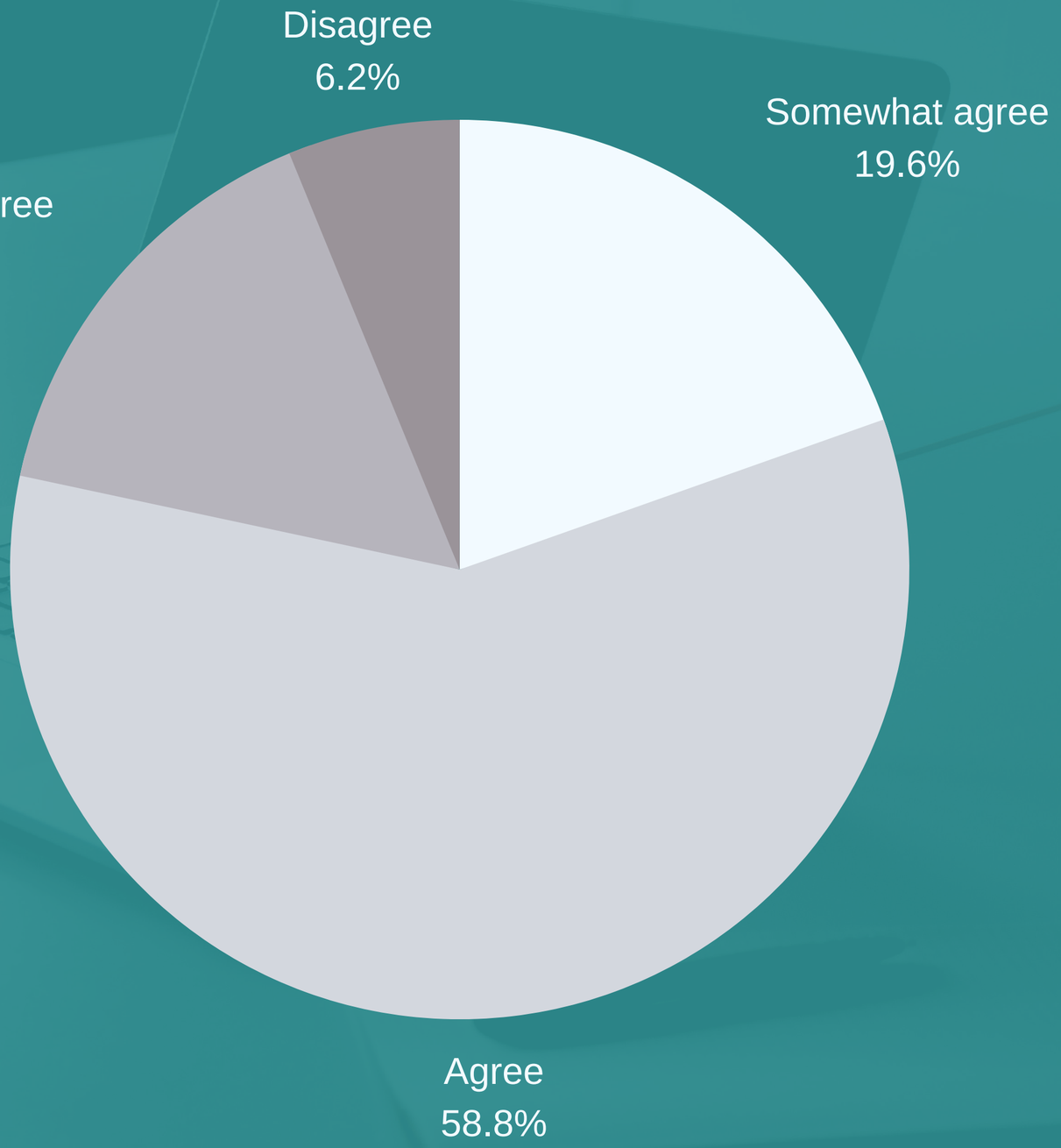
6.B

I WILL HAVE TO KEEP IMPROVING MY SKILLS TO REMAIN EMPLOYABLE.

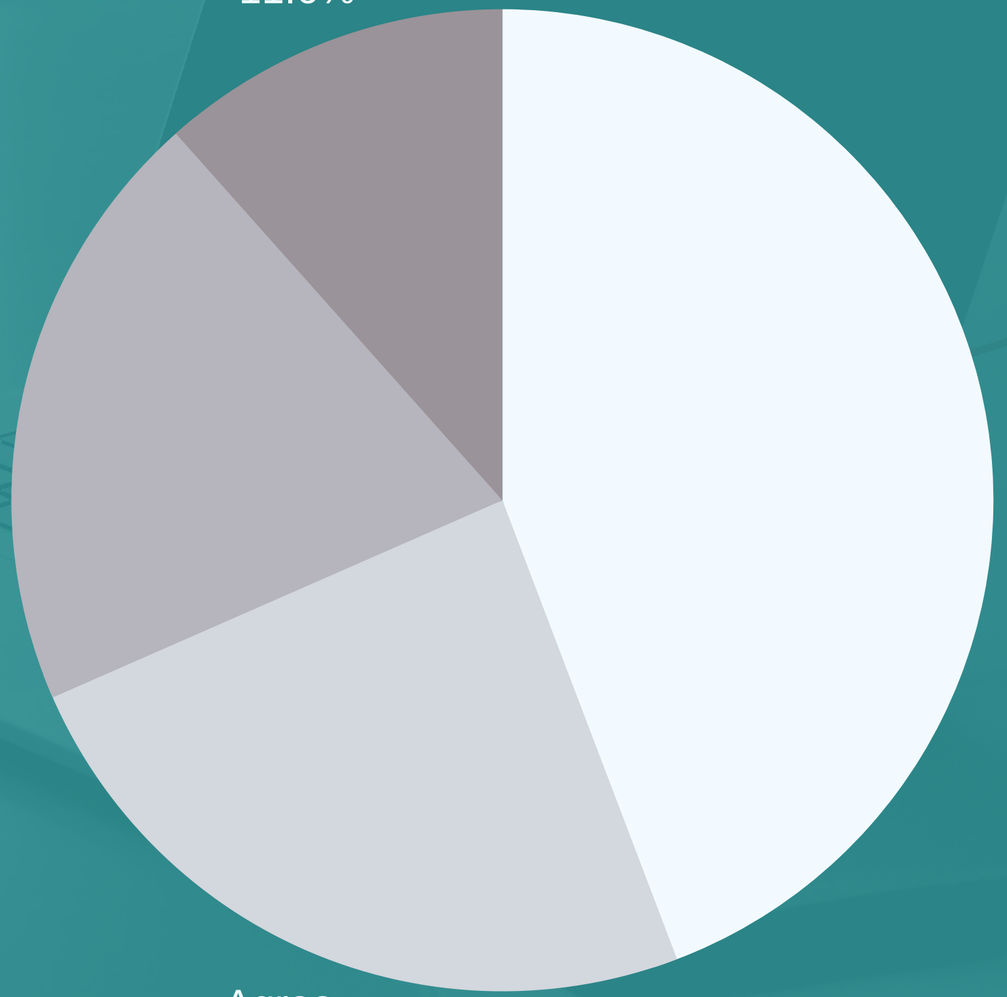


6.C

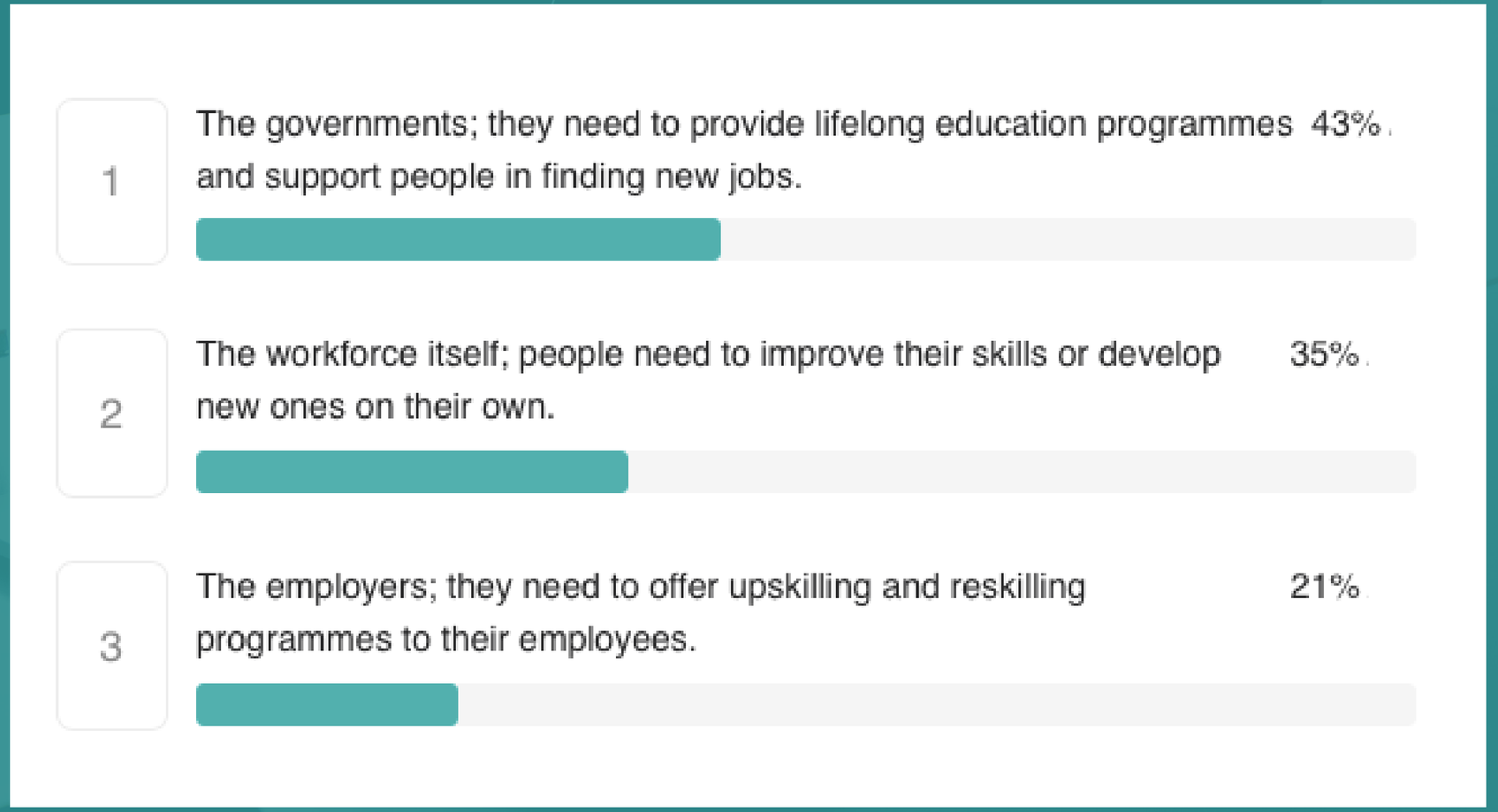
I WILL HAVE TO DEVELOP NEW SKILLS ALL TOGETHER TO REMAIN EMPLOYABLE.



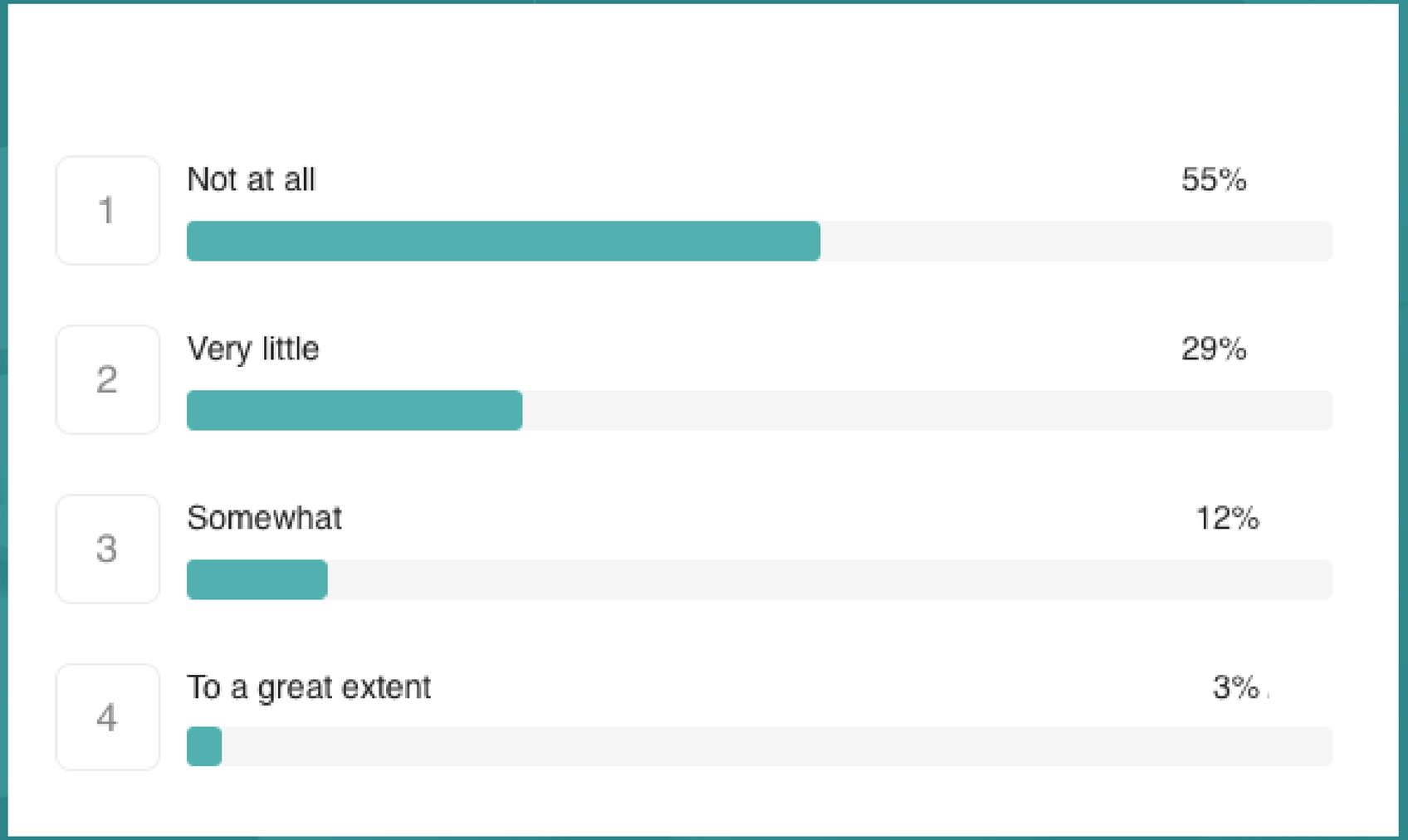
6.D
I AM READY TO ENHANCE MY SKILLS TO REMAIN EMPLOYABLE, BUT I AM NOT VERY SURE I KNOW WHERE TO START.



7.
WHO BEARS THE HIGHEST RESPONSIBILITY IN ENSURING THAT THE CURRENT WORKFORCE CAN ADAPT ITSELF TO THE CHANGING WORLD OF WORK?

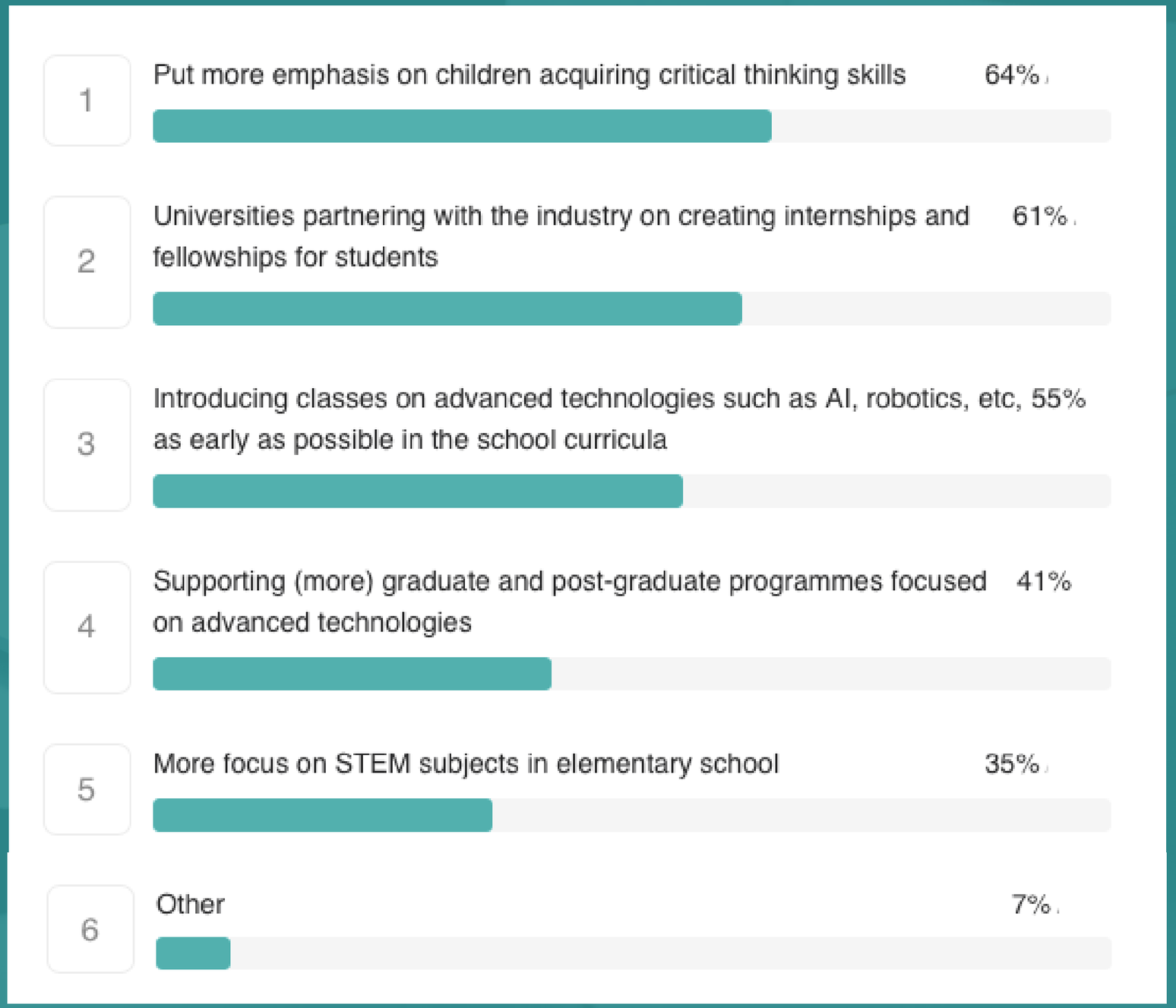


8.
DO YOU THINK THE EDUCATIONAL SYSTEM IN YOUR COUNTRY IS SUITABLE FOR PREPARING CHILDREN FOR THE JOBS OF TOMORROW?

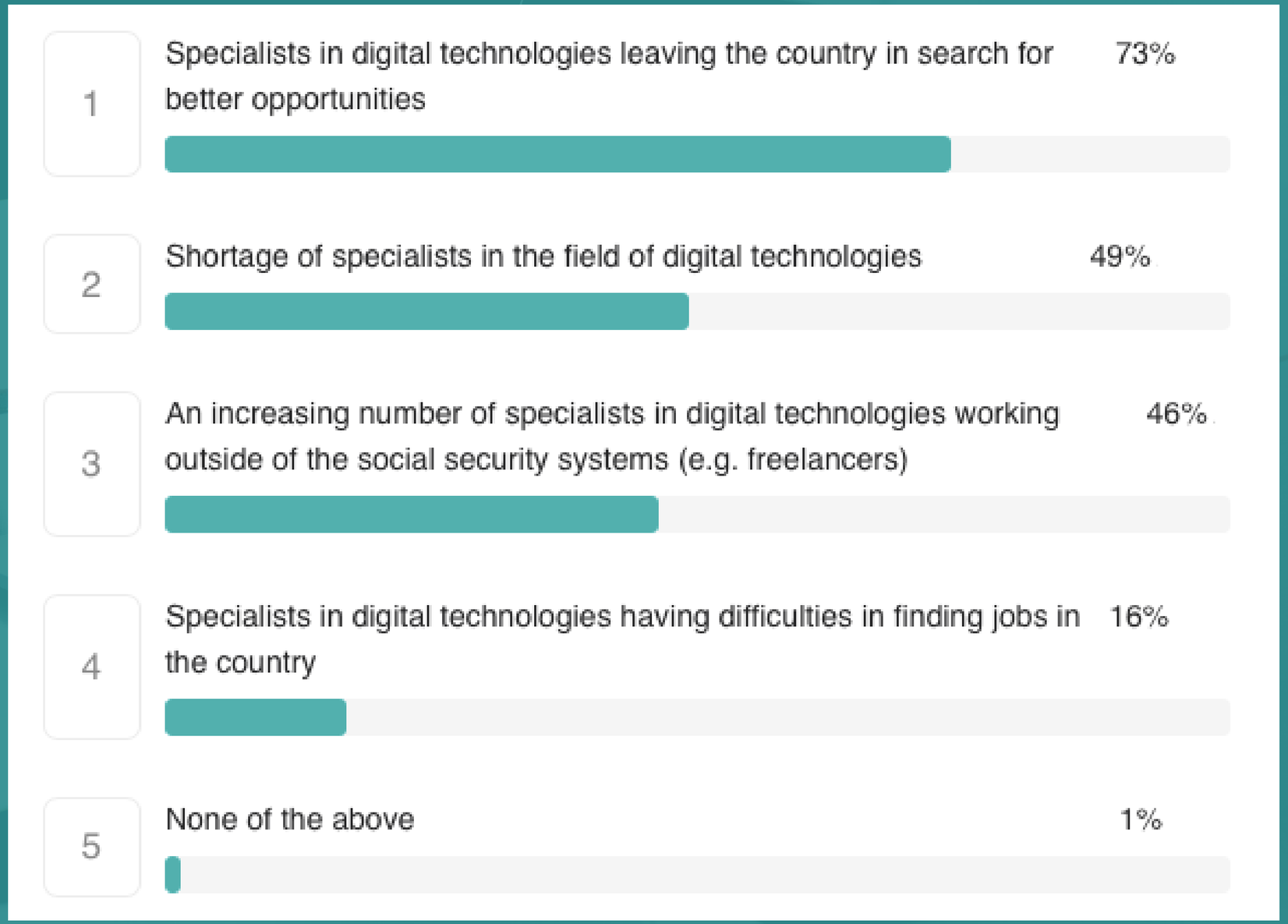


9.

HOW CAN NATIONAL EDUCATIONAL SYSTEMS BE BETTER ADAPTED TO PREPARE CHILDREN FOR THE FUTURE OF WORK?

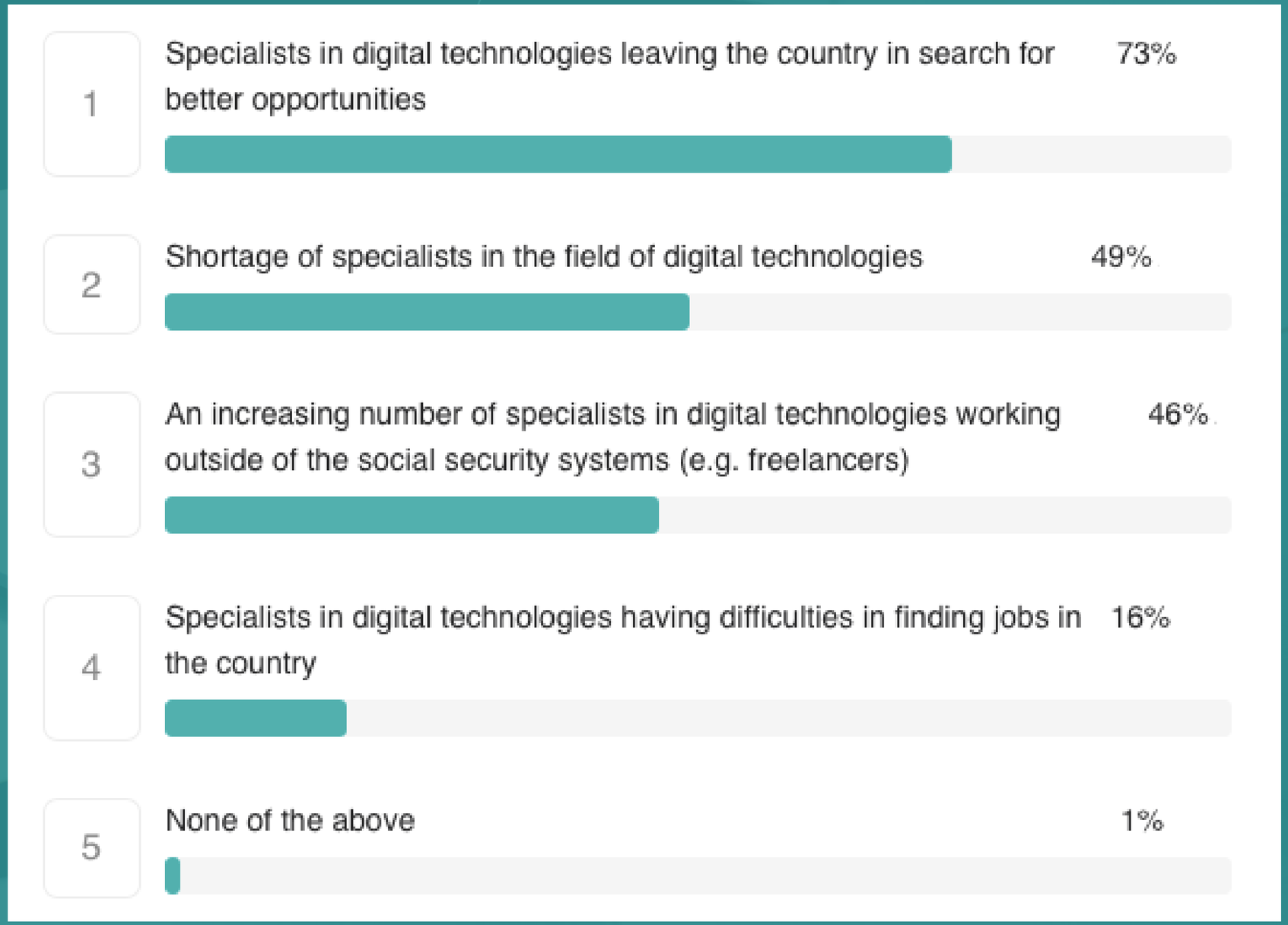


10.
WOULD YOU SAY YOUR COUNTRY IS FACING ANY OF THE ISSUES LISTED BELOW?



11.
DO YOU THINK THERE ARE APPROPRIATE POLICIES, PROGRAMMES OR REGULATIONS IN YOUR COUNTRY FOCUSED ON THE DIGITAL LABOUR MARKET?

(E.G. DEALING WITH THE ISSUES OUTLINED IN QUESTION 10; SUPPORTING THE UPSKILLING AND RESKILLING OF THE CURRENT WORKFORCE; PREPARING THE NEXT GENERATIONS FOR THE JOBS OF TOMORROW, ETC.)



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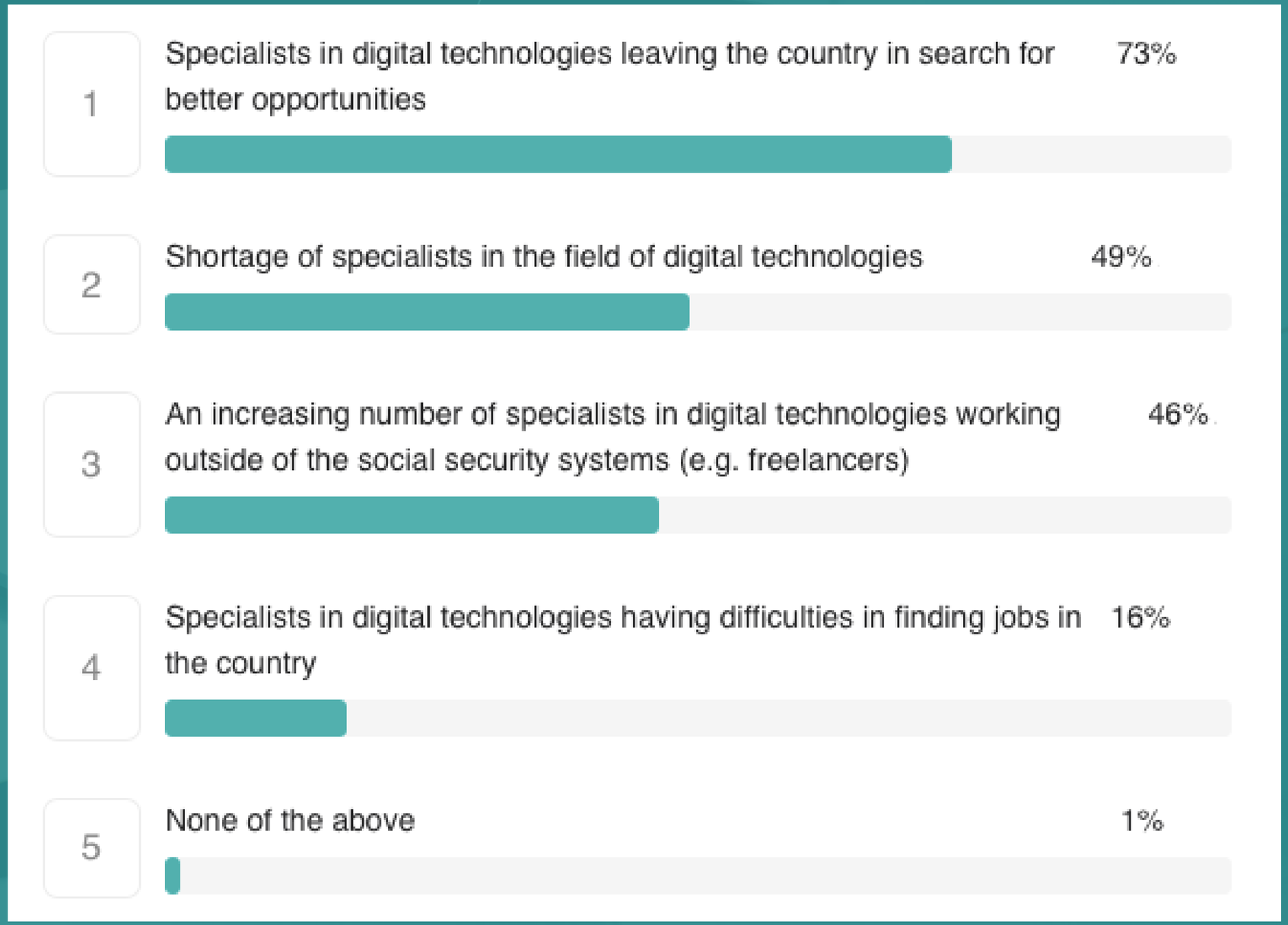


EXAMPLES OF DIGITAL LABOUR MARKET POLICIES

"Interoperability solutions is a program for european public administrations, it is also applied by Romania. "

"There are a few schools in Armenia focused on developing digital skills and creative thinking - TUMO, Armath Engineering labs. I believe this is key for the next gen to have job in the future."

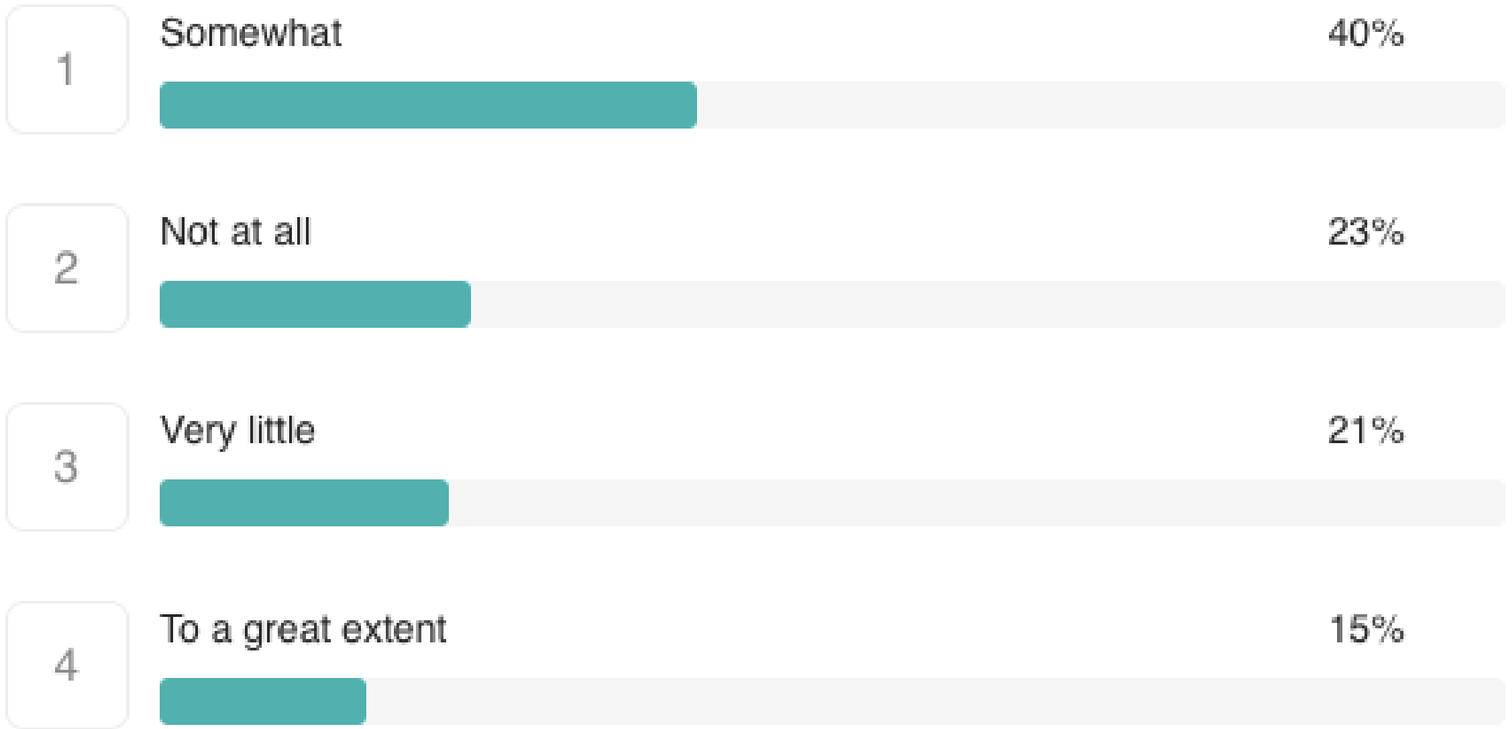
"I’m not sure if it is the case since the Albanian government hasn’t said it officially, but to me the new curriculum introduced in Elementary Schools has similarities with the Common Core Curriculum introduced in the USA a few years back which fosters critical thinking and problem-solving."

"In Bosnia and Herzegovina, few cantons have adopted strategies for IT education, offering funds, programs and opportunities for its students."

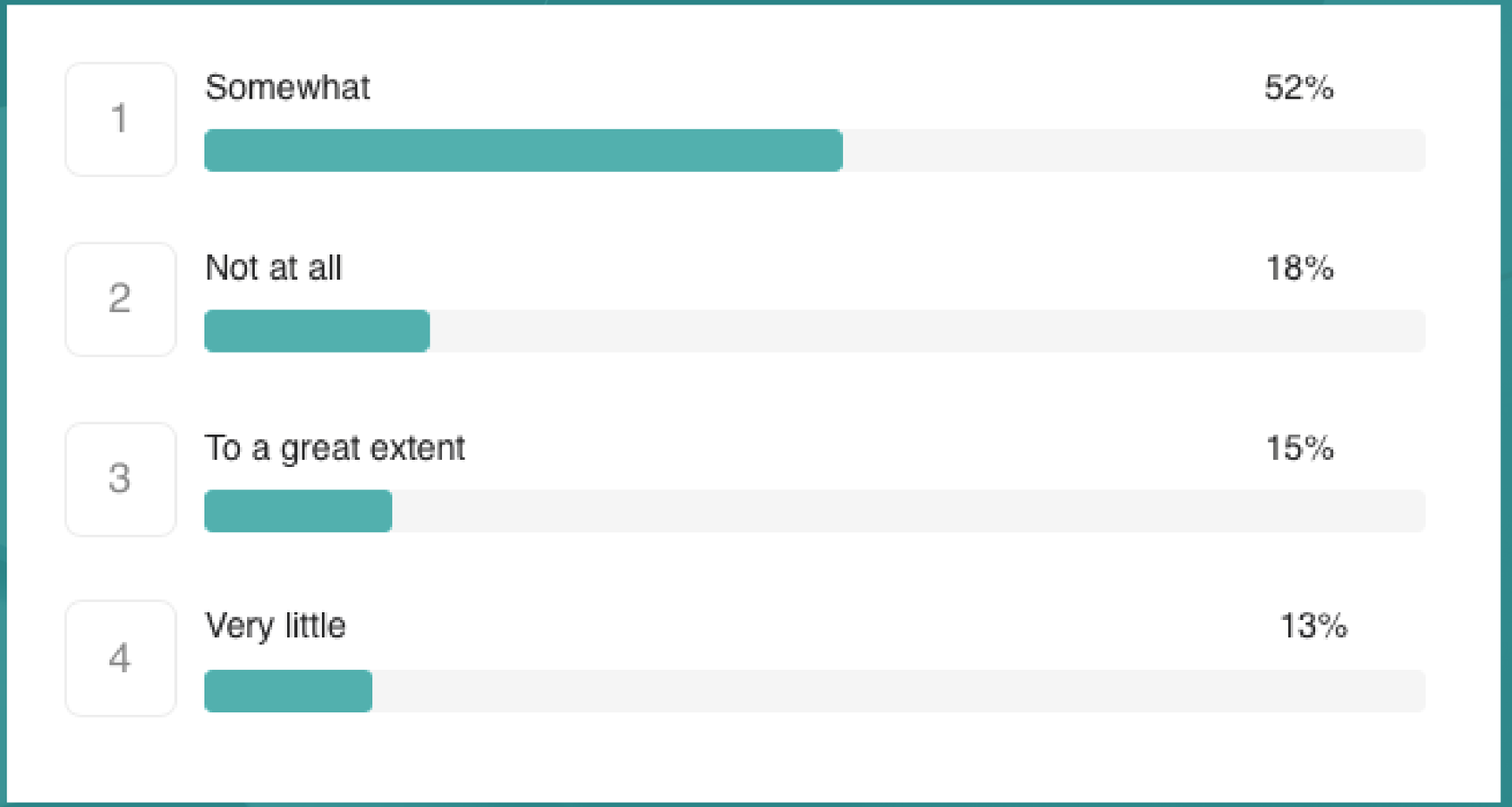
13.

BELOW ARE POTENTIAL MEASURES THAT GOVERNMENTS COULD TAKE TO MITIGATE THE POSSIBLE NEGATIVE EFFECTS OF TECHNOLOGICAL PROGRESS ON THE EMPLOYABILITY OF THE WORKFORCE. HOW SUITABLE DO YOU FIND THEM?

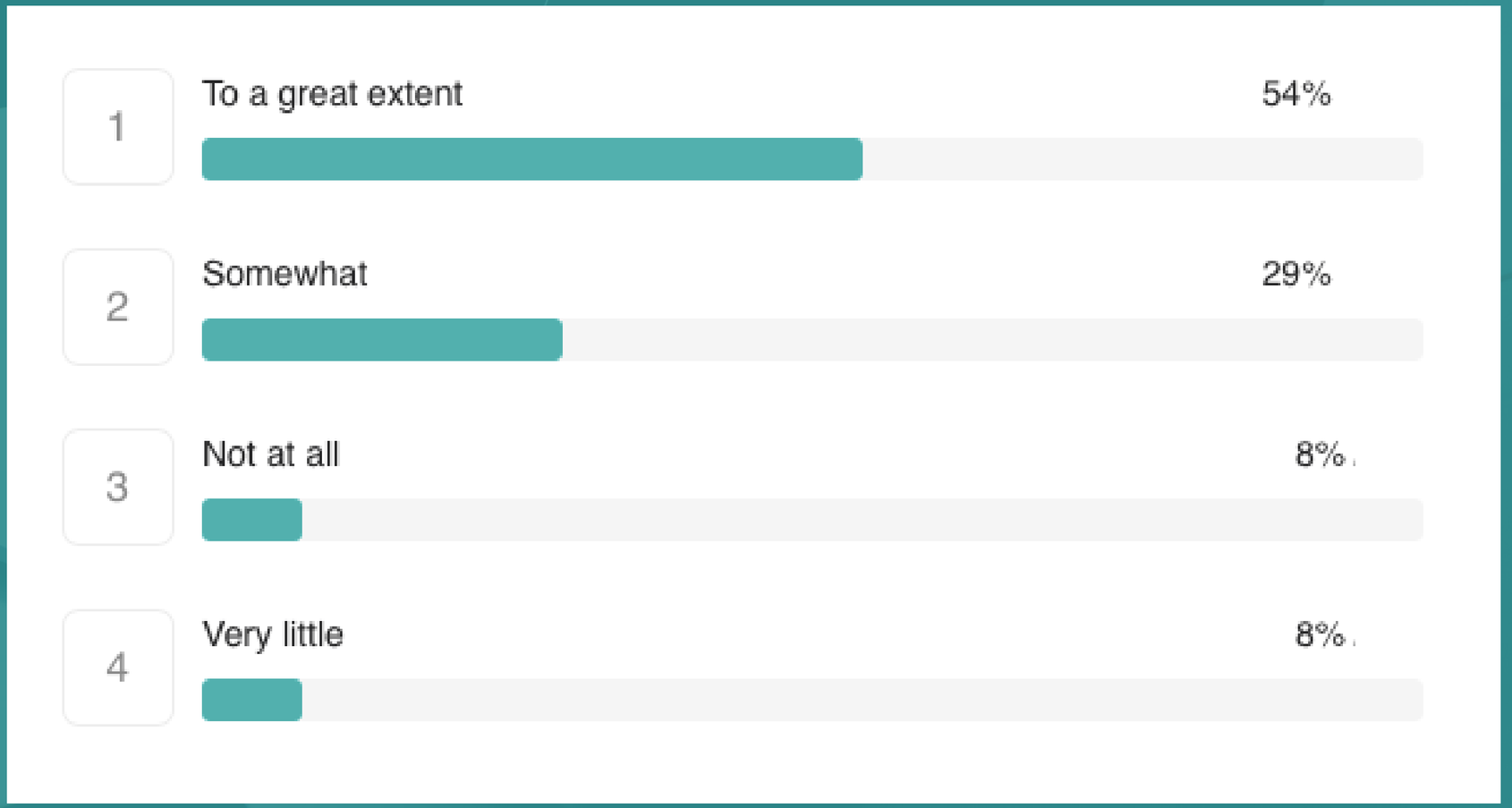
13.A
GUARANTEE A UNIVERSAL BASIC INCOME AS A SOCIAL SAFETY NET FOR PEOPLE WHO CANNOT FIND JOBS IN A WORLD WHERE TECHNOLOGY REPLACES MANY HUMAN TASKS.



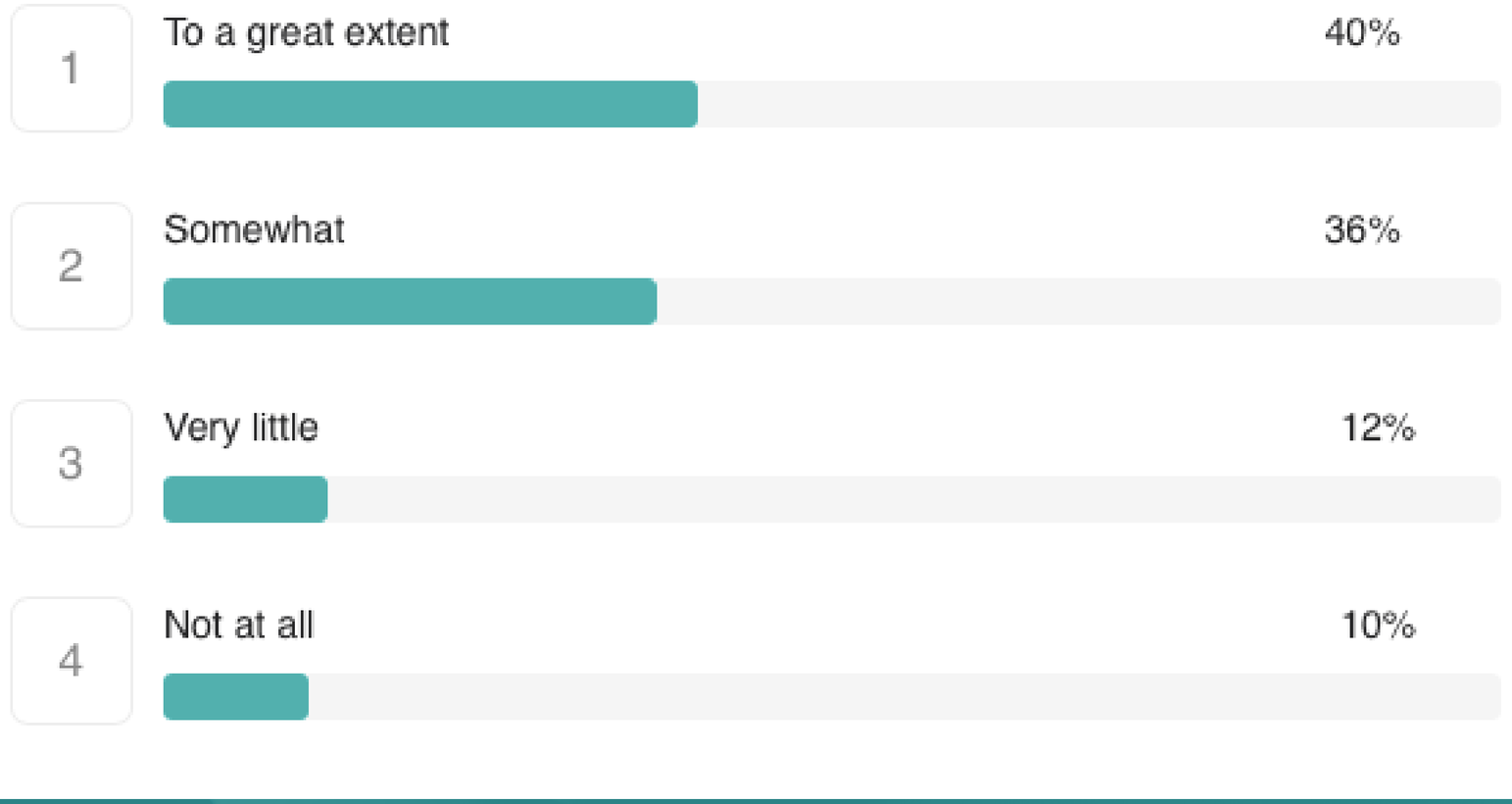
13.B
LEVYING TAXES ON THE WORK PERFORMED BY MACHINES, TO COLLECT FUNDS THAT CAN BE THEN REDIRECTED TO SOCIAL SECURITY PROGRAMMES.



13.C
WORK TOGETHER WITH THE INDUSTRY TO OFFER UPSKILLING AND RESKILLING OPPORTUNITIES TO WORKERS.



13.D
SUPPORT THE DEVELOPMENT OF NEW ECONOMIC SECTORS FOCUSED ON SOFT SKILLS THAT TECHNOLOGY CANNOT (EASILY) REPLACE.



14.

IF YOU WERE TO SET A PRIORITY OR PROPOSE AN ACTIVITY TO YOUR GOVERNMENT ON HOW TO GET THE COUNTRY READY FOR THE FUTURE OF WORK, WHAT WOULD THAT BE?

"Emphasise on practical digital / technology skills, functional literacy"

"Focus on business needs regarding education "

"Introducing flexible working hours to better the work life balance"

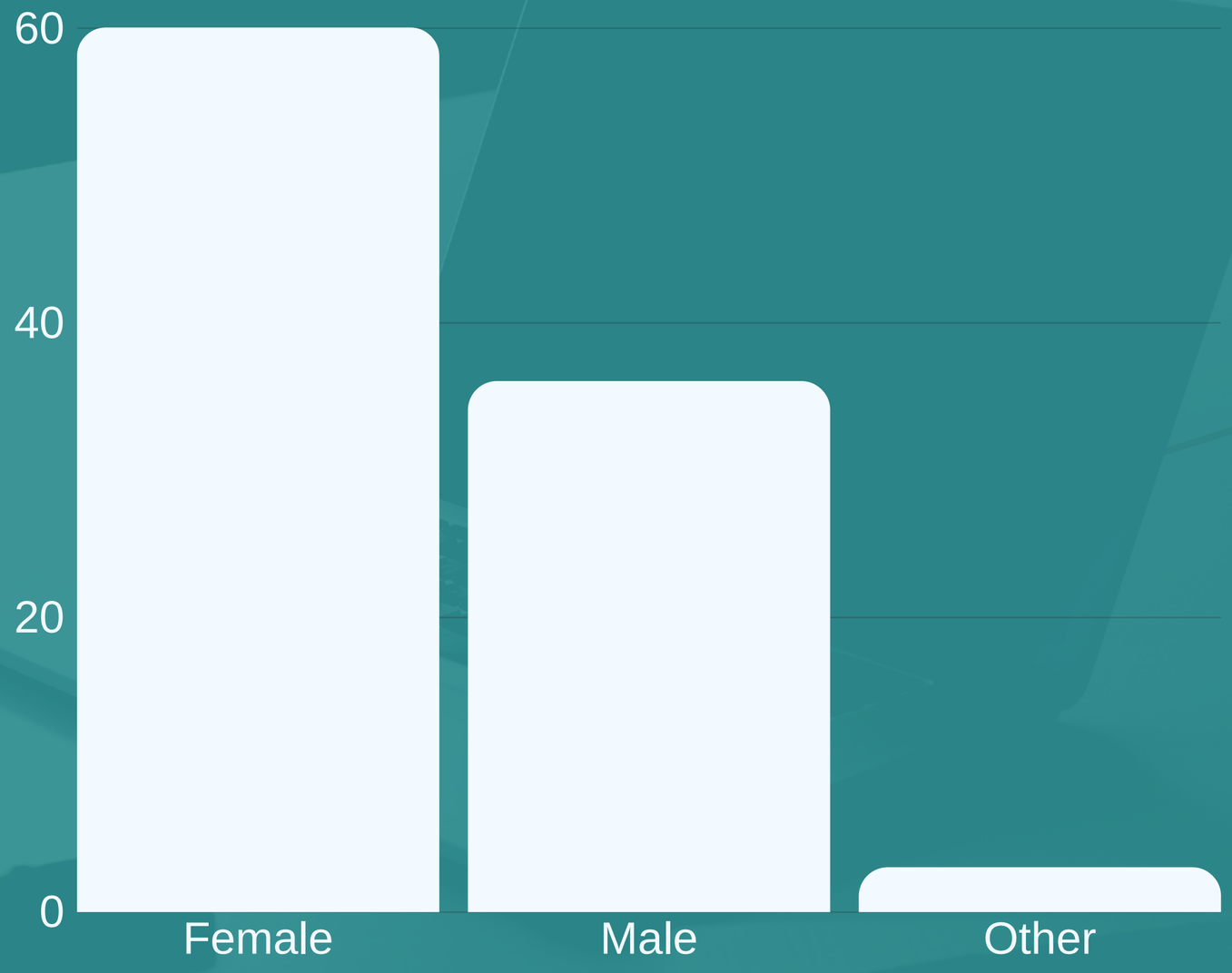
"Gradual transition and provision of free training adjusted to the needs of each specific sector"

"Tax regulations for different positions/sectors."

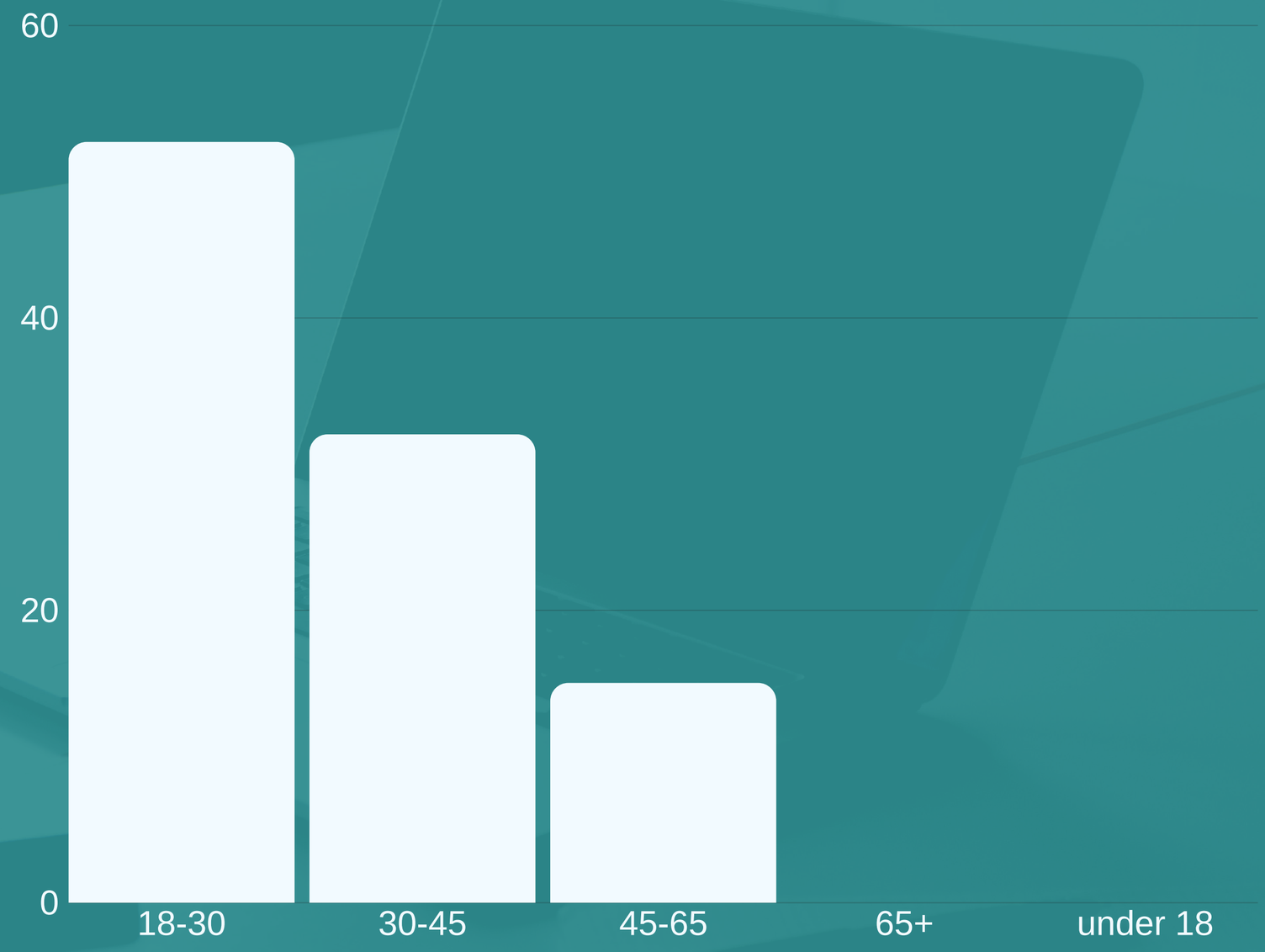
DEMOGRAPHICS

15.A
COUNTRIES OF RESPONDENTS

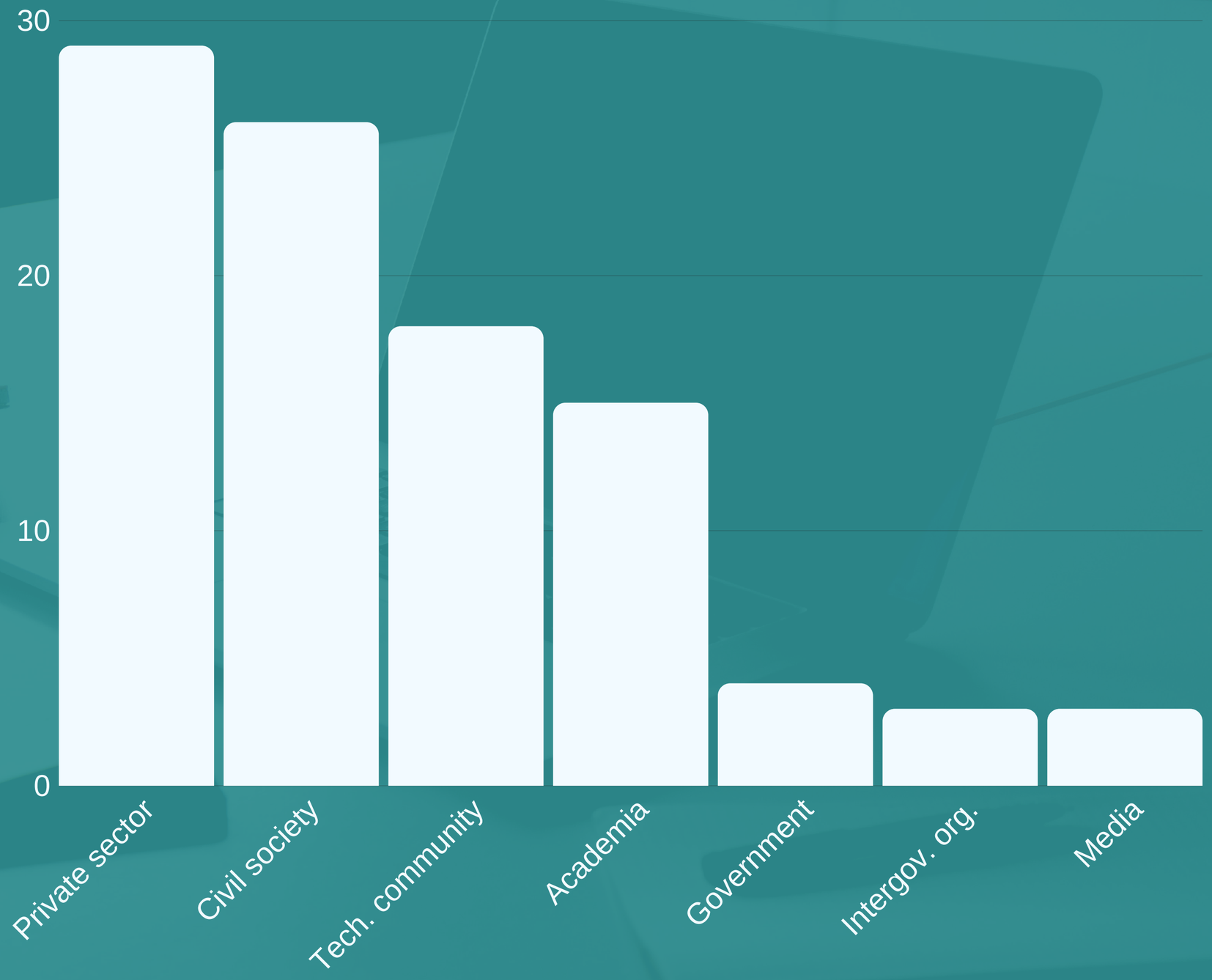
15.B
GENDER OF
RESPONDENTS



15.B
AGE OF
RESPONDENTS



15.C
STAKEHOLDER GROUP OF RESPONDENTS



FINAL NOTES

More details about the survey are available at https://seedig.net/survey-2019-future-work/.
For any queries, please contact us at execom@seedig.net.