



The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation gap - Agreement ref. VS/2018/0040

The financial sector in the face of the digitization: the new skills required of workers

Delphi survey Main objectives & structure



Thessaloniki, 11th June 2019

Overview

Delphi Survey

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Main Objectives & Survey Sample

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Why? To construct possible **future scenarios** focused on **skills disruption** induced by **digitisation** in the financial industry and also centred on the **tools to deal with change** through **age diversity management strategies** and the **intergenerational solidarity** approach

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Key respondents ↔ **Panel of Experts: trade union representatives** of different roles and countries of practice (i.e. 3-4 negotiators from national organisations, 2-3 professionals from Eurocadres, 2-3 experts from Uni-Europa)

Overview

Delphi Survey – 1st Round

Main Sections

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The survey is structured as follows:

Section 1 – Preliminary consideration

Section 2 – Digitalization & Skills disruption

Section 3 – Final remarks & Best practices

The survey has been designed to be simple and fast in its completion (it should take about **10 minutes**).

Survey Tool: Google Modules

Delphi Survey – design process

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Literature Review

Used to identify and collect relevant insights to draft survey questions
(formulation of the statements)

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1st round [ADAPT]

First set of questions organised to gain **preliminary information from the experience and knowledge of the participants**, who are experts in the relevant field

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2nd round [University of Łodz]

The results of the previous round are given as **feedback**. The experts answer from the second round on under the influence of their colleagues' opinions, (this is what differentiates Delphi from ordinary opinion surveys)

Delphi Survey – Feedback & Evaluation process

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- After the 1st round, a **standard feedback** about the statistical group judgement (i.e. calculated from median and quartiles of single prognoses) is given and if possible, the arguments and counter arguments of the extreme answers are fed back (i.e. through graphs & figures)
- In addition, the overall survey is designed in order to meet the **QCA evaluation methodology**: final results will be analysed by Polibienestar.

For detailed description of the delphi method:

http://forlearn.jrc.ec.europa.eu/guide/4_methodology/method_delphi.htm

Delphi Survey – 1st round draft

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Survey “Views and perceptions on Age Management of banking sector”

The following semi-structured interview is the first round of a Delphi study carried out in the context of The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable growth and generation gap.

The survey is structured as follows:

- Section 1 – PRELIMINARY CONSIDERATIONS
- Section 2 – DIGITALIZATION & SKILLS DISRUPTION
- Section 3 – FINAL REMARKS & BEST PRACTICES

Completion of the survey is simple and fast (it should take about 10 minutes).

About the project "The European social dialogue and the development of the solidarity between generations of workers: focus on “over 55” and young workers in the finance sector. Sustainable Growth and generation gap". Is a project co-funded by the European Commission, Directorate General of Employment, Social Affairs & Inclusion VS/2018/0040.



Survey “Views and perceptions on Age Management of banking sector”

*Mandatory field

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Section 1 – PRELIMINARY CONSIDERATIONS

1. In your opinion, during the past 5 years, has the technological factor been the main driver of change in EU financial sector workplaces? *

Yes

No

2. In your opinion, during the past 5 years, which have been other drivers of change in EU financial sector workplaces? *
(multiple answer)

Organisational models

Products or services

Legal framework

Environment changes

Ageing of the workforce

Other: _____

3. In your opinion, during the past 5 years, has the introduction of new technologies affected the employment rates among older workers (workers aged 55–64) in the finance sector? *

Yes

No

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4. And, as far as it concerns younger workers (workers aged 18–30) which is the main risk associated with their increasing inclusion in companies of (in terms of ratio over the other age groups)? *

- Loss of technical skills (company and sector level)
- Loss of soft skills (company and sector level)
- Problem in re-setting organizational structure
- No risks, only opportunities

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Section 2 – DIGITALISATION & SKILLS DISRUPTIONS

5. Is the financial sector affected by digital skills imbalances phenomena? (e.g. difficulty in supplying vacancies with professional profiles with the necessary digital skills) *

- Yes
- No

6. Do you think that digitalization will have an influence on the qualifications required by financial sectors workers? *

- Yes
- No

7. What kind of digital technologies did the financial sector introduce in the last 5 years? *

(multiple answer)

- Augmented Reality
- Simulation
- Internet of Things
- Cloud
- Big Data and Analytics
- Cybersecurity
- Other: _____

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8. How have jobs changed in the financial sector with the introduction of digital technologies? *

Please, select the most relevant option

- New jobs have emerged
- Old jobs have disappeared
- Old jobs have been enriched by new tasks
- Don't know

As for your personal experience, please rate the following information: *

	Strongly disagree	Disagree	Maybe Agree	Agree	Strongly agree
Completely new technical skills are required to deal with new technologies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tackling the lack of digital skills is just one part of the solution, that needs to be complemented with the development of other technical and behavioral skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Modern workplaces require workers to perform different tasks, thus improving workers' versatility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. How is the financial sector responding to workers' lack of necessary technical and/or soft skills to deal with the changes in their task and responsibilities? *

- Job rotation
- Training programmes
- Selection of new professional figures
- Increase automation
- Other: _____

11. Which are, in your opinion, the jobs at higher risk of substitution patterns? (Occupations within financial sector at risk of automatability).
Please, provide at least 2 examples.

12. Which kind of digital skills are the most requested in finance sector nowadays? (multiple answer) *

- Basic digital competences
- Software development and maintenance
- Digital marketing e social media
- Data analytics
- Digital ICT
- Other: _____

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Section 3 – FINAL REMARKS & BEST PRACTICES

13. As for age management issues linked to skills dynamics, could you provide examples of emerging perspectives and best practices put in place with the involvement of social partners?

- Yes
 No

14. If yes, please, provide a brief description
(Please, provide: name of the initiative – actors involved – workers' reactions – outputs- level: national/regional/European)

La tua risposta

15. Could you identify existing barriers for adopting measures and policy instruments dealing with Age Management at the workplace?

- Yes
 No

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Privacy statement

The data subject consents to data processing for the purposes laid down in the privacy statement available at the following link [XXY](#), and to the extent that his/her consent is legally necessary, as well as to communicate his/her data to the other parties, as specified in the privacy disclosure referred to above. In your capacity as the data subject, we would like to inform you that you can withdraw your consent at any time, without affecting the legal nature of data processing, which is based on the consent provided before the withdrawal. Prior to giving consent, you had been informed about this state of affairs.

After having read the privacy disclosure, I give my consent to data processing for the following purposes: *

- to fill out the questionnaire

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SUBMIT

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Delphi Survey – Data Analysis

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2 answers

SUMMARY

INDIVIDUAL



Allow answers

About the project "The European social dialogue and the development of the solidarity between generations of workers: focus on "over 55" and young workers in the finance sector. Sustainable Growth and generation gap". Is a project co-funded by the European Commission, Directorate General of Employment, Social Affairs & Inclusion VS/2018/0040.

Data analysis quick and easy thanks to Google Excel spreadsheet and automatic graphs and figures

Thank you!

 **@adaptland @MargheRoi**

11th June 2019