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OCCUPATIONAL AND TRAINING NEEDS OF ITALIAN COMPANIES

Key findings of the 2026 survey

EXECUTIVE SUMMARY

EXCELSIOR
SISTEMA DI MONITORAGGIO PER L'OCCUPAZIONE E LA FORMAZIONE

EXECUTIVE SUMMARY

- Trade tensions and a renewed energy shock are weighing on the Italian economy: the IMF forecasts GDP growth of 0.8% in 2026, while October inflation is estimated at 5.6%. The labour market nevertheless remains resilient. In the second quarter of 2026, employment is 4.6% above its early-2019 level and hours worked are up 8.7%, without a comparable recovery in productivity. Structural gaps persist: in 2025 the female employment rate stands at 53.8%, compared with 66.5% in the euro area, while only 31.1% of Italians aged 25–34 hold a tertiary qualification, against an EU average of 44.8%.
- Artificial intelligence (AI) adoption is accelerating: the share of firms using AI rises from 12.4% in 2025 to 21.5% in 2026 but remains highly uneven between micro-enterprises (17.2%) and firms with at least 500 employees (65.5%). Text generation and summarisation are the most common applications (53.7% of AI users), while process automation is less widespread (11.9%). Among AI-using firms, 46.3% express a high or very high level of agreement that AI can support employees and improve their efficiency, but only 4.7% have already recruited staff specifically to manage these technologies.
- Italian firms plan almost 5.93 million workforce entries in 2026, around 120,000 more than in 2025 (+2.1%). Services account for nearly half of the increase (+58,000 entries) and industry for approximately 31,000, while the primary sector records the strongest relative growth (+7.3%). Manufacturing demand increases by 3.9%, whereas construction declines by 1.1%. The South and Islands account for over 60% of national growth, with 73,000 additional entries (+4.0%), followed by the North-West (+1.9%), the Centre (+1.1%) and the North-East (+0.4%). Firms with fewer than 50 employees account for 64% of entries, while those with 50–499 employees generate around half of the increase.
- Employers prefer candidates under 30 for 1.56 million entries (26.3%, compared with 27.5% in 2025), while age is not a determining factor for 33.5%. Experience in the occupation or sector is required for 64.3% of entries. Almost one million positions explicitly favour female candidates (16.8%), while gender is not a determining factor for 51.9%. Approximately 298,000 entries are aimed at both young people and women (19.2% of entries with a preference for under-30 candidates). Expected entries for foreign workers total 1.44 million (24.3%).
- Fixed-term contracts account for more than 3.6 million workforce entries (+126,000), while permanent contracts and apprenticeships decline; their combined share falls from 21.9% to 20.8%. Temporary contracts mainly meet seasonal needs in the primary sector and tourism but are more often used as a trial period in industry and construction. Firms mainly recruit through candidates they already know (40.4%) and CVs received directly (34.8%); only 8.0% use links with schools and training institutions.
- Despite growing demand, hard-to-fill entries decline by around 100,000 to 2.62 million, with their share falling from 47.0% to 44.3%. A shortage of candidates affects 26.9% of all entries and inadequate candidate preparation 13.6%, the latter being relatively more prevalent in industry. In construction, 60.9% of entries are hard to fill (around 330,000 positions), compared with 43.8% in tourism, which nevertheless accounts for over 517,000 such positions. Among craft and related trades workers, 58.6% of entries are hard to fill and the average recruitment period is 6.4 months. For 45.9% of hard-to-fill entries, firms plan to recruit candidates with related skills and provide training after recruitment.

- The ten most requested occupations account for 2.69 million workforce entries (45.3%), mainly in retail trade, hospitality, operational services and logistics. Overall, 17.5% of planned workforce entries concern roles not previously present within the firm, including traditional occupations. VET qualifications and diplomas account for 40.1% of educational requirements, followed by upper secondary school diplomas (23.2%) and tertiary education (13.0%). Recruitment difficulties are especially high for ITS Academy graduates (58.8%), although vocational pathways account for a larger number of hard-to-fill entries in absolute terms.
- Flexibility and adaptability (65.2%) and teamwork (55.5%) are the skills most frequently rated as highly important. The ability to use digital and multimedia tools is required for 61.3% of planned workforce entries and rated as highly important for 19.4%: a difference that reflects the widespread demand for this skill compared with the smaller share of positions where it is considered particularly important. Energy saving and environmental sustainability are rated as highly important for 38.4% of planned workforce entries.
- Analysis of online job postings reveals increasingly detailed skill requirements: in the first nine months of 2026, each posting mentioned an average of 9.0 skills, compared with 7.2 in the same period of 2025. Soft skills appeared in 85.2% of postings and digital skills in 47.0%. Although AI-related skills appeared in only 1.6% of postings, the number of postings mentioning them more than doubled compared with the same period of 2025; green skills appeared in 4.0% of postings, with the number of such postings increasing by 27.5%.

EXCELSIOR 2026 – KEY FIGURES

Female workers	Young people under 30	Foreign
17%	26%	24%

Contract types		
Employees	Temporary agency workers	Collaborators and other self-employed
85%	8%	6%

Education levels		
VET qualification and diploma	Upper 2° school diploma	ITS diploma and university
40%	23%	13%

Recruitment difficulties	
Totale	Young workers
44%	46%

Workforce entries by occupational group

	% Recruitment difficulties	Workforce requested
Managers and highly skilled professionals	47.5	329,120
Technicians and associate professionals	51.0	638,950
Clerical support workers	31.8	427,720
Service and sales workers	42.1	1,682,860
Craft and related trades workers	58.6	981,540
Plant and machine operators and assemblers	49.7	673,370

Workforce entries by economical sectors

463,200	Primary sector
1,493,380	Industry
951,660	Manufacturing and public utilities
541,720	Construction
3,970,980	Services
775,390	Wholesale and retail trade
1,182,860	Accommodation, food
1,290,840	Business services
721,890	Personal services

2026 Expected workforce entries: 5,927,550

Hardest-to-fill occupations for young workers

	% Young workers recruitment difficulties	Young workers requested
Filing and records management clerks	79.2	1,680
Building finishing trades workers	77.1	53,340
Life science professionals	75.6	4,980
Wood products machine operators	75.3	1,370
Mathematical, chemical, physical and...	73.2	960
Printing trades workers	71.6	2,950

Skills

Workforce entries requested with high level skills

Communication skills			Technological skills			Green skills		Soft skills			
Communicating in italian	in foreign languages	Intercultural skills	Mathematical and computer languages	Applying technologies for innovation	Using digital skills	Energy saving / environmental sustainability	Applying green	Flexibility and adaptability	Team working	Independently	Problem solving
36%	15%	33%	15%	10%	19%	38%	19%	65%	55%	41%	41%