

Joint Action Health Workforce  
Planning and Forecasting



Joint Action Health Workforce  
Planning and Forecasting

# Joint Action: Its rationale, history and outcomes



## CLOSURE EVENT MEETING Joint Action Health Workforce Sustainability vision session

Mons, Belgium  
May 3rd - 4th 2016

Zuzana Matlonova and Miroslava Gogova  
Ministry of Health Slovakia

# Rationale of the Joint Action

Health workforce planning is necessary for the proper management of country's healthcare system. Many countries are facing difficulties in establishing a framework enabling them to gather relevant information, to integrate this data into a planning model and to have the necessary political debates in order to adopt the necessary measures to improve the sustainability of their healthcare systems.

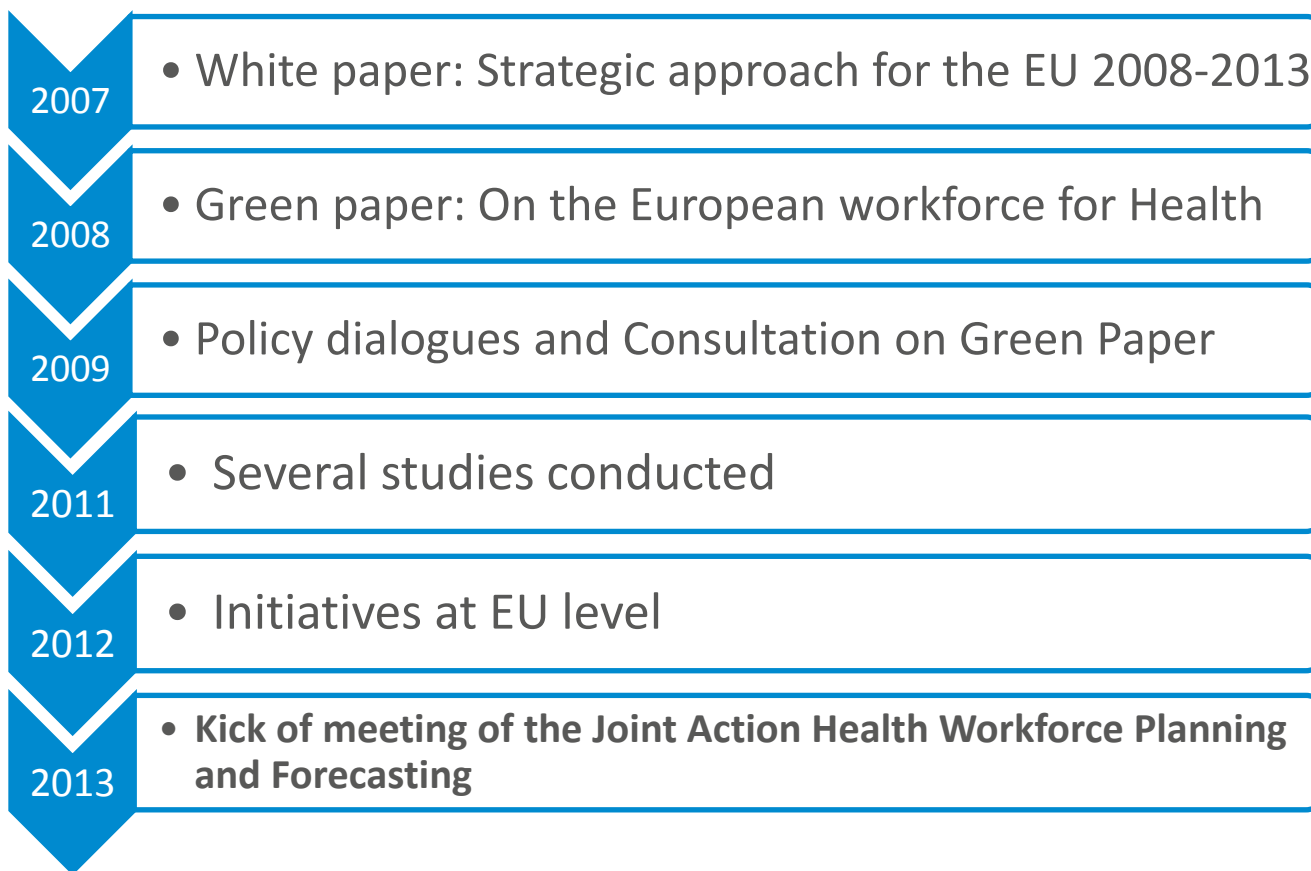


Joint Action Health Workforce aims to provide a platform and support in collaboration and exchange of valuable information and good practices between Member states to support them to prepare the future of health workforce.

## Joint Action works towards:

- Better understanding of terminology
- Better monitoring by access to timely data
- Information on mobility of health workforce
- Guidelines on qualitative planning methodologies
- Handbook on health workforce planning methodologies
- Increased qualitative and quantitative planning capacity
- Estimation of future skills and competences needed for health workforce
- A platform for cooperation to find possible solutions on expected shortages
- Impact of health workforce planning on policy decision making

# History of the Joint Action in brief



# Joint Action deliverables

# Terminology gap analysis (D041)

**DELIVERABLE D041. - Version 09/5**  
Terminology gap analysis

WP4, Semmelweis University,  
Health Services Management Training Centre, Hungary

**WP4**  
**Terminology gap analysis**  
**D041**

Version/ Status	Last updated	Owner
Module Concepts	22.05.2014.	Hungarian Team + WP1 + Reviewers
Draft 01	20.07.2014.	Hungarian Team + WP1 + Reviewers
Draft 02	11.08.2014.	Hungarian Team + WP1
Draft 07	03.09.2014.	Hungarian Team + WP1
Draft 08	06.10.2014.	Hungarian Team + WP3 + WP1
Draft 08/2	20.10.2014.	Core reviewers + WP3
Draft 09	24.10.2014.	Executive Board (WP1 + WP2 + WP3)
Draft 09/2	05.01.2015.	WP4 Partners
Draft 09/3	29.01.2015.	WP3
Draft 09/4	20.02.2015.	Submission to the Executive Board
Draft 09/5	10.03.2015.	Submission to General Assembly
Draft 09/5	24.03.2015.	Submission for scientific editor
Draft 1	19.08.2015	Submission for WP7

Funded by the Health Programme of the European Union

Page 1

The relative unavailability and inadequacy of data are major obstacles to thoroughly assess the extent and impact of health workforce challenges and possible policies. Since 2010, EUROSTAT, the OECD, and WHO have carried out a joint data collection exercise that could benefit the countries in enhancing the in-country data collection and inter-country comparisons. However, the quality of the data submitted by Member States makes analysis unreliable, despite the growing number of categories for which data is provided.

Work Package 4 of the Joint Action has performed an analysis and presents this report on the Joint Questionnaire, aiming to contribute to the improvement of this data collection scheme.

## Milestone - Report on the applicability of the WHO Global Code of Practice on the International Recruitment of Health Professionals in a European Union Context



Report – Version 1.0  
The applicability of the WHO Global Code of Practice on the International Recruitment of Health Personnel within a European context  
WPI4, Semmelweis University, Health Services Management Training Centre, Hungary

WP4 Report  
The applicability of the WHO Global Code of Practice on the International Recruitment of Health Personnel within a European context



Joint Action Health Workforce Planning and Forecasting



Final Version  
Report on Mobility data  
WP4. Semmelweis University  
Health Services Management Training Centre, Hungary

Version/Status	Deadline for update	Owner(s)
Version 05	20 Jan 2014	WP4
Version 06	26 Jan 2015	WP1, presenters at ti
Version 07	12 Feb 2015	WP4 members
Version 08	23 Feb 2015	WP3
Version 09	26 Feb 2015	Executive Board
Version 1.0	16 Mar 2015	Finalised after E.B. a

Authors: Réka Kovács – activity leader, Zoltán Aszalós, Edit Cserháti, Edmond Girasek, András Wéber, Michel Van Hoegaerden

WP4 Report on Mobility data

Health workforce mobility data serving policy objectives



Joint Action Health Workforce Planning and Forecasting

Version and Status	Deadline	Contributor
D042 Concept - OK	06 May 2015	WP4 + PGM
Draft 01 - OK	07 June 2015	WP4
Draft 02 - OK	10 August 2015	WP4 + PGM + WP1
Draft 03 - OK	25 September 2015	WP4 + Reviewers
Draft 04 - OK	12 October 2015	WP3 1st round + Reviewers
Draft 05 - OK	23 October 2015	WP4 Partners
Draft 06 - OK	27 October 2015	WP4 - Submission to WP3
Draft 07 - OK	07 November 2015	WP4 - Submission to the EB
Draft 08 - OK	11 December 2015	WP4 - Submission to WP3
Draft 09 - OK	20 Jan 2016	WP3 + WP4 to Bremen EB
Draft 095 - OK	7 March 2016	WP4 + Professional Editor
Final	11 March 2016	WP4

Authors: Zoltán Aszalós (Work Package 4 leader), Réka Kovács, Edit Eke, Eszter Kovács, Zoltán Cserháti, Edmond Girasek, and Michel Van Hoegaerden (Program Manager of the Joint Action)



Joint Action Health Workforce Planning and Forecasting



Funded by the Health Programme of the European Union

This document reports on the research and meetings held under the umbrella of the Joint Action to explore the applicability of the WHO Code of Practice to EU in the specific context of the Single Market. By reporting on the participants views and presenting experiences, it aims at initiating a dialogue and support further discussions.

## Report on mobility data - Health workforce mobility data serving policy objectives (D042)

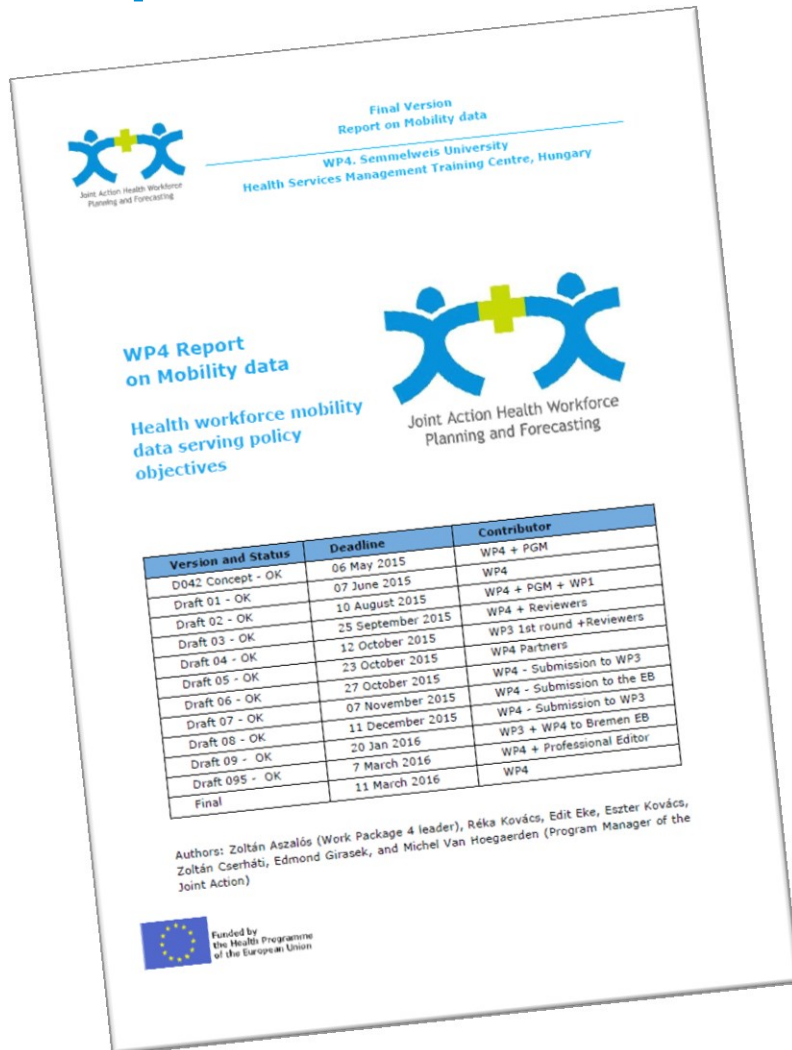
This report presents mobility data categories and indicators that can support national evidence based policy making regarding health workforce outflow and inflow. The report also explores why EU Member States collect mobility data, what data sources they rely on, and also discusses the potential of international data collections on mobility.



Funded by the Health Programme of the European Union



# Report on Health Workforce Planning Data (D043 )




The objective of this report is:

- to share knowledge about a selection of HWF planning systems in the EU,
- to support MS in setting up and developing their HWF planning systems,
- to provide a gap analysis for a better understanding of the factors that limit national HWF planning processes and reduce the quality of national HWF planning data,
- to present good practices via a thorough analysis of the availability of HWF planning data, and by underlining the role of data and data management processes in HWF planning,
- to propose practical solutions and a toolkit that can help to overcome gaps and enable data development and management

# MINIMUM PLANNING DATA REQUIREMENTS FOR HEALTH WORKFORCE PLANNING (D051 )

JA Health Workforce Planning and Forecasting  
D.051 – Release 1  
MINIMUM PLANNING DATA REQUIREMENTS  
FOR HEALTH WORKFORCE PLANNING

WP5  
Deliverable  
D.051

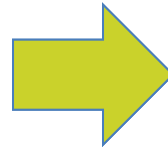



Joint Action Health Workforce  
Planning and Forecasting

Funded by  
the Health Programme  
of the European Union

Version/Status	Last updated	Owner
Draft 01	2013.11.04	Italian Team
Draft 02	2013.11.08	Italian Team – integrations
Draft 02	2013.11.18	With Partners' comments and notes
Draft 03	2013.11.30	Italian Team
Draft 04	2014.01.23	Italian Team after EB comments and notes
Draft 05	2014.04.14	Text drafting_ Final version

Ministero della Salute

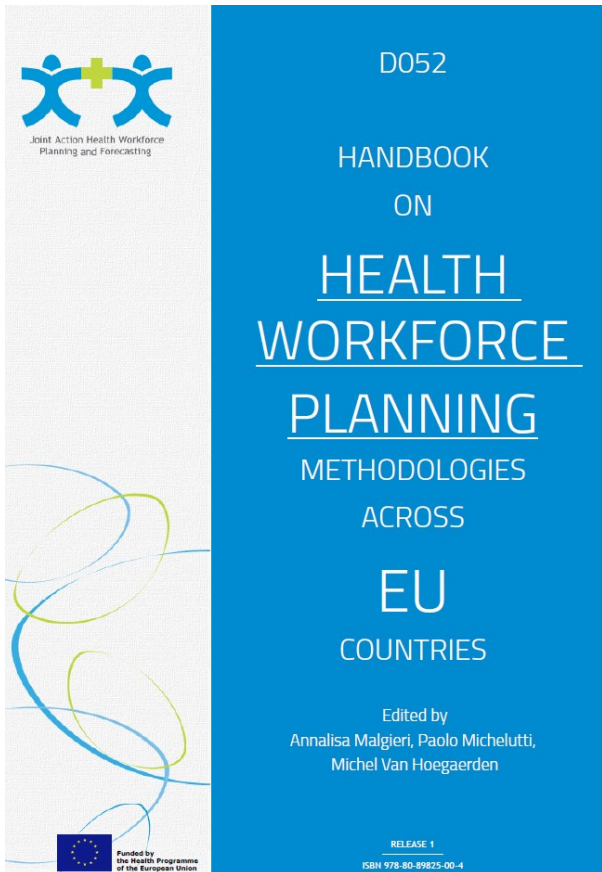


This document contains the results of a shared process involving thirty-seven EU partners of the Joint Action EUHWF (European member states as well as stakeholder organizations).

These results are a consensus recommendation on the key planning indicators and the related minimum set of data that may be adopted by the EU Member States as a common necessary tool kit to provide basic forecasting and enable a basic planning process to take place.

A future release of this paper will address the recommendations for the necessary data set and indicators needed to draw future enhanced scenarios.

# Handbook on Health Workforce Planning Methodologies across EU Countries (D052 )



The Handbook on Health Workforce Planning Methodologies aims to furnish a useful contribution to all those who are engaged in the development and improvement of HWF planning systems in EU countries.

The focus is on planning experiences concretely realized and currently working. The Handbook describes and analyzes the planning practices developed in selected EU countries. As such, planning systems developed in Belgium, Denmark, England, Finland, Norway, Spain and the Netherlands have been analyzed through a grid of 5 elements as the 5 key elements of the planning system.

The comparison of these key aspects among the seven planning systems highlighted the diversity of approaches to the issue of workforce planning in healthcare, but also allowed to detect some constants.

## D053 Web Portal on HWF Planning Methodologies

**HANDBOOK ON HEALTH WORKFORCE PLANNING METHODOLOGIES ACROSS EU COUNTRIES**

An overview of the Handbook and a link to the full download

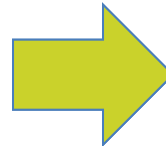
1 minute read

**IMPLEMENTATION PATH**  
Guidelines and suggestions on how to implement a new planning

**FROM THEORY TO PRACTICE**  
Paths for those who wants to know the essential theoretical

# Report on WP5 Pilot Study Experiences (D054)

## WP5 Report on Pilot Projects and Feasibility Studies D054



Version/Status	Last updated	Owner(s)
Version 01	11/04/2016	WP5 Italian Team
Version 02		
Version 03		
Version 04		
Version 05		

Ministry of Health in Italy and Ministry of Health in Portugal carried out a Pilot Project in their Country in order to develop their planning system using and experimenting the good practices and the recommendations described in the Handbook.

The focus of the Pilot Project in Italy was on 3 key elements:

Organisation, Forecasting model, Data sources, while the other two key elements (“goals” and “link to policy actions”) were considered not liable to be changed during the timeframe of the project, as fixed by law. However, confirming that the five key elements are strictly connected, the changes proposed on the first three highlighted needs of improvement also on the latter two. The focus of the Pilot Project in Portugal was on: Data sources; Forecasting model.

At the same time, two feasibility study were conducted in order to analyse the practicability to implement a HWF planning system, on the base of Handbook recommendations, in two different contexts: in two German Landers (Bremen and Hamburg), where HWF planning is completely in charge of local stakeholders; in two eastern European countries (Romania and Moldova) where HWF planning is not practiced also because its efficacy is challenged by the mass HWF migration outflows.

# User guidelines on qualitative methods in health workforce planning and forecasting (D061)

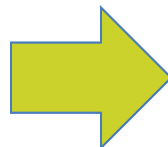


User guidelines on qualitative methods in health workforce planning and forecasting

WP6  
Deliverable  
D.061



Joint Action Health Workforce  
Planning and Forecasting



User guidelines on  
qualitative methods in  
health workforce planning  
and forecasting

Authors: John Fellows and Matt Edwards  
Centre for Workforce Intelligence, UK

These user guidelines are aimed broadly at health workforce planners and forecasters in Member States and stakeholder organizations in the European Union who would like to apply qualitative methods to improve their health workforce planning and forecasting in their specific national contexts.

This document describes the qualitative methods used by partners in Work Package 6 in the Joint Action on Health Workforce Planning and Forecasting. Qualitative methods are those which are used to gather and process information on the key factors which are likely to affect the supply and demand of health workforces (through techniques such as interviews) and includes methods to describe and quantify potential futures.



Funded by  
the Health Programme  
of the European Union



CENTRE  
FOR  
WORKFORCE  
INTELLIGENCE



Joint Action Health Workforce  
Planning and Forecasting



Funded by  
the Health Programme  
of the European Union

# Future skills and competences of the health workforce in Europe (D062)



This report is a future-oriented scan (out to 2035) for drivers of change, their potential implications, distribution and an estimation of future needs for the skills and competences of the health workforce in the European Union.

# Pilot study experiences in Belgium using horizon scanning and Delphi (D064)

Overall the approaches of horizon scanning and Delphi have added value to the General Practitioner (GP) review in Belgium. As an overall result, these methods will be used again as part of workforce planning and integrated into the overall approach by Belgium for the future. The findings of the pilot study will go forward into the advice and recommendations for the overall GP review.

The cover of the report features the logos of the Centre for Workforce Intelligence (CFWI), the Federal Public Service for Health, Food Safety and the Environment (Vlaamse Gemeenschap Landbouw, Natuur en Leefmilieu), and the Joint Action Health Workforce Planning and Forecasting. The title is prominently displayed in a blue box. At the bottom, it is noted that the report is funded by the European Union's Horizon Scanning programme.

## Web Content on Horizon Scanning (D063)

The screenshot shows the homepage of the website. It features a navigation menu with links for Home, About, Results, News, Events, Partners, Partner Pages, Contact Us, and Web Portals. The main banner includes the title 'Welcome to the pages of the EU Joint Action on Health Workforce Planning & Forecasting' and a sub-header stating the mission: 'This Joint Action aims to improve the capacity for health workforce planning and forecasting by supporting European collaboration'. Below the banner are three featured content blocks: 'Handbook on HWF Planning Methodologies', 'The Future Health Workforce Planning for the future health workforce across Europe including the skills and competences implications', and a 'Join our Newsletter' form with fields for email and name, and checkboxes for 'Newsletter List' and 'List of Experts'.



DELIVERABLE D071 – Final  
SUSTAINABILITY PLAN

WP7 Medical University of Varna and National Centre of Public Health  
and Analyses, Sofia, Bulgaria  
Catholic University of Leuven, Belgium

# Sustainability plan (D071)

## WP7 Sustainability plan D071



### WORK PACKAGE 7

Medical University of Varna, Bulgaria  
Catholic University of Leuven, Belgium  
National Centre of Public Health and Analyses, Sofia, Bulgaria



The sustainability plan is built on the basis of The Knoster model (it connects the symptom with the components of change). The main roles of the stakeholders' group, the policy dialogues, the educational plans for transferring the knowledge and the indicators for monitoring the implementation are considered in the sustainability plan.



Page 1







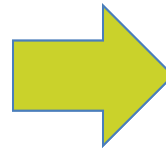
List of Experts – release 1  
Version – 1.0

# Network of Experts (D072)

D072  
List of Experts  
RELEASE 1



Joint Action Health Workforce  
Planning and Forecasting JA logo



The Joint Action on Health Workforce Planning & Forecasting, funded by the Health Programme of the European Union is progressing towards the creation of a platform for collaboration and exchange of experts in Health Workforce Planning and Forecasting. This network is urgently needed to help the European Union to identify and address the increasing unbalance of health workforce.

## WORK PACKAGE 7

Medical University of Varna, Bulgaria  
Catholic University of Leuven, Belgium  
National Centre of Public Health and Analysis, Sofia, Bulgaria



Funded by  
the Health Programme  
of the European Union



KU LEUVEN



Joint Action Health Workforce  
Planning and Forecasting



Funded by  
the Health Programme  
of the European Union

# Report on Circular Migration of the Health Workforce



Report - Final version  
Circular Migration of the Health Workforce  
WP7- Catholic University of Leuven, Belgium  
Medical University of Varna, Bulgaria

## WP7 Report on Circular Migration of the Health Workforce



Joint Action Health Workforce  
Planning and Forecasting

Report on Circular Migration of the Health Workforce is a part of D074 Recommendations towards Policy Making. This report provides an overview on circular migration of the health workforce and provides European Member States with preliminary guidance on how source and destination countries may cooperate in order to find a mutually beneficial solution in terms of circular mobility of the health workforce, within the framework of the WHO Global Code of Practice.

## Concept of the technical recommendations & recommendations towards policy making (D073, D074)

This document presents in a concise form the vision and recommendations for a sustainable development of the EU cooperation in the health workforce planning and forecasting. It is a deliverable of the Joint Action on Health Workforce Planning and Forecasting (JAHWF) in accordance with the Grant Agreement of the European Commission.

Version/Status	Last updated	Owner(s)
Version 01	21/12/2015	Catholic University of Leuven
Version 02	30/12/2015	Catholic University of Leuven (to V
Version 03	15/01/2016	Catholic University of Leuven (to J
Version 04	05/02/2016	Catholic University of Leuven (fina



DELIVERABLE D073/D074 – Version 01.3  
Concept of the technical recommendations & recommendations towards policy making  
WP7- Medical University of Varna and National Centre of Public Health and Analyses, Bulgaria  
Catholic University of Leuven, Belgium

## WP7 Concept of the technical recommendations & recommendations towards policy making D073/D074



Joint Action Health Workforce  
Planning and Forecasting



Funded by the Health Programme of the European Union

Version/Status	Last updated	Owner(s)
Version 01	16/01/2016	WP7 (to Executive Board)
Version 01.1	26/01/2016	WP7 (to Executive Board)
Version 01.2	26/02/2016	WP7 (to Survey participants)
Version 01.3	30/03/2016	WP7 (to WP3 and WP Leaders)
Version 02		



Funded by the Health Programme of the European Union

# Combined and Complete HWF Planning and Forecasting Guide(D080)

[www.healthworkforce.eu](http://www.healthworkforce.eu)

## ORGANISING THE STAKEHOLDERS INVOLVEMENT

In order to guarantee a permanent process and to achieve the desired goals, all the health workforce planning activities require a process of organising. The engagement of the stakeholders is strategic in this process. It gives commitment to the forecasting results and supports the communication to the policy makers. The involvement assume different forms for different type of stakeholders, also depending on the national and the local regulations.

**Key messages**

- Stakeholders' involvement is one of the fundamental and most critical points of the whole planning system. The importance of their involvement is due both to the necessity of acquire information and points of view and to find the consensus on some solutions.
- In any case, this involvement is often critical, both for the number of interested stakeholders and for the size of the process.
- Each time, the involvement is often critical, both for the number of interested stakeholders and for the size of the process.

**THE JOINT ACTION ON HEALTH WORKFORCE IN PERSPECTIVE**

While the Joint Action on Health Workforce Planning & Forecasting (JAHWF) is a major step in a journey that spanned several years, it is important to situate the programme in a continuum of awareness-raising steps, which resulted in the collection of theoretical knowledge and its practical implementation. A sustainability strategy should have as its aim further practical realisations, whilst also keeping in mind the origins of the EU Health Workforce policy actions.

**Timeline**

The following timeline depicts how the Joint Action on HWF was developed throughout the course of 10 years of European investment in Health Workforce strategies and highlights some of the Joint Action's main results.

**ANALYSIS ON HEALTH WORKFORCE TERMINOLOGY**

Available and accurate data on health workforce is essential for health workforce planning. National health workforce planning in EU Member States can be based on terminology applied and data available at national level, which can be supported by international health workforce planning guidelines and tools. Agreed international terminology is a prerequisite for sharing such planning guidelines and recommendations across Member States.

**Key messages**

- As health workforce planning usually takes place at national or regional level, a clear national or regional system for terminology, complemented with accurate data plays more important role for planning than international terminology definitions.
- Although international data collection requires health workforce data based on occupations, data based on qualifications fits better the purposes of health workforce planning. Registries can be appropriate data sources for keeping records on health workforce with additional information on health care labour market activities in the activity category available closest to practice.

**Connection between international and national data collections and terminologies**

International data reporting - the Joint Questionnaire on non-monetary health care statistics

The Joint Questionnaire (JQ) by the Eurostat, OECD and WHO Europe is a harmonised tool for international reporting on health workforce, which enables the tracking of trends and allows international comparisons to a certain extent. As an internationally accepted data collection system, the terminology and definitions used in Joint Questionnaire can serve as a basis for common terminology in international planning guidelines. Definitions are agreed for each data category, and health professional groups are defined by the Standard International Classification of Occupations (ISCO-08) with less emphasis on qualifications.

**Key messages**

- National classifications and data collection systems based in the EU are not fully compliant with the JQ categories. Therefore Member States face challenges in submitting the data for the JQ. Data interpretation or transformation according to the ISCO categories can cause difficulties, when different national classifications exist or only qualification-based data is available.
- Gaps between international and national terminologies both reflect and result in a lack of comparability between systems.
- For the purposes of national health workforce planning only terminology and data available at national level can be used. In case of regional level planning, even more difficulties can occur due to the differences between regions, or between the regional and national systems.

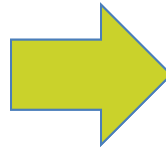
**Diagram:**

```

    graph TD
      A[National data collection] -- Gaps --> B[International data collection (JQ)]
      C[Health workforce planning or forecasting at national level] --> D[International HWF terminology]
      E[National terminology] -- Gaps --> D
      D --> C
  
```

**WP1, The Joint A**  
[www.healthworkforce.eu](http://www.healthworkforce.eu)

Zoltán Azzaló, Réka Kovács, Edit Eke, Eszter Kovács, Zoltán Cséhi, Edmond Girzauk, and Michel Van Hoegaerden, Report on Terminology - [www.healthworkforce.eu](http://www.healthworkforce.eu)



It will contain the Information sheets created by WPs on topics of:

- Terminology, HWF Planning Data and Mobility Data
- Quantitative Methods for EU HWF Planning and Forecasting
- Horizon Scanning
- Sustainability

# Supporting tools of sustainability

## Work Package 1

- presentation of the Joint Action on the outside
- fostering networking among the partners
- organization of Plenary Assembly
- coordination of consistency and scientific validity of the JA outputs

## Work Package 2

- communication of results to the wider audience
- co-organization of the JA conferences
- organization of the Stakeholder forum
- managing website and webportals

## Work Package 3

- systematic approach for the internal evaluation
- verification that Joint Action is being implemented as planned
- ensuring the quality of the deliverables



Joint Action Health Workforce  
Planning and Forecasting

# THANK YOU FOR YOUR ATTENTION

Contact: [zuzana.matlonova@health.gov.sk](mailto:zuzana.matlonova@health.gov.sk)



Funded by  
the Health Programme  
of the European Union