



**«FRAMEWORK OF ACTIONS FOR THE LIFELONG  
DEVELOPMENT OF COMPETENCIES AND  
QUALIFICATIONS»**

**Third follow-up report**

**2005**

**European Trade Union Confederation\***

**Union of Industrial and Employers' Confederations of  
Europe – UNICE/UEAPME\*\***

**European Centre of Enterprises with Public Participation  
and of Enterprises of General Economic Interest**

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COMPETENCIES AND QUALIFICATIONS »**

**Third follow-up report**

22 March 2005

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\* The ETUC delegation includes representatives of the Eurocadres/CEC Liaison Committee

\*\* UEAPME - European Association of Craft, Small and Medium-Sized Enterprises

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## Foreword

In March 2002, the European social partners adopted a framework of actions for the lifelong development of competences and qualifications, as a contribution to the implementation of the Lisbon strategy<sup>1</sup>.

They identified four areas for priority actions. These priorities are:

- to identify and anticipate competences and qualifications needs;
- to recognise and validate competences and qualifications;
- to inform, support and provide guidance;
- to mobilise resources.

The member organisations of UNICE/UEAPME, CEEP and ETUC agreed to promote the framework of actions in Member States at all appropriate levels taking account of national practices and to transmit this document to all interested players at European and national levels.

The social partners also decided to draw up an annual report on the national actions carried out on the four priorities identified.

After three annual reports, the social partners will evaluate the impact on both companies and workers. This evaluation can lead to an update of the priorities identified and to enhanced social dialogue notably taking into consideration the Maastricht communiqué signed at European level on 14 December 2004. The social dialogue ad hoc group on education and training will be entrusted with this evaluation, which will be presented in March 2006.

This is the third annual follow-up report and the first one including reports on social partners' activities in the new EU member states. The report describes social partners' activities on development of competences and qualifications at cross-industry, sectoral and company levels and gives useful examples of good practices. It testifies to the intensification of dialogue and partnership between social partners and their willingness to find practical solutions to the lifelong learning challenges in Europe.

Finally, European social partners consider this report as a major joint contribution to the Lisbon strategy, which will be presented to the European Spring Council 2005. They urge the Commission and the Council to take account of their work in the current discussions on the future of the education and training systems in Europe.

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<sup>1</sup> The framework of actions adopted in March 2002 can be found in annex

## Chapter I – Main trends

This report is the third to be published on the follow-up to the framework of actions. The description of social partner initiatives for the development of competences and qualifications in the Member States that joined the EU in May 2004 is a new and significant element compared to the previous reports. What clearly emerges in the present report is that social partners have intensively debated the issue of competence development in all Member States.

In accordance with their national needs and practices of dialogue, be it bipartite and/or with public authorities, employers' and employees' organisations have continued to work on the lifelong development of competences and qualifications at national, sectoral and company levels. Many joint activities reported have a prolonged effect over several years, and even if they were concluded in 2002, they remained valid in 2003 and still are in 2004.

In 2004, reported activities show that social partners across the EU play a key role in the definition of more **coherent lifelong learning policies** in their respective countries. The globalisation of commercial exchanges, the development of ICT, companies' needs to have an increasingly mobile, well qualified and competent workforce to remain competitive, are recognized as key challenges in all Member States. Social partners intensively debated the implementation of integrated approaches to employment, education and training policies with the aim to foster economic growth and social cohesion. In a great number of countries, social partners have for example participated in coordination, advisory and/or policy-making bodies in charge of devising integrated lifelong learning strategies.

One of the common features arising from the 2005 follow-up report is the involvement of social partners in actions to **improve the conditions of adult learning**. This is in particular true for the new Member States. Several reports mention the impetus for reform given by the publication of international benchmarking studies on education and training systems such as the PISA study. Work has been undertaken to develop or redefine national qualification frameworks which on the one hand ensure a certain permeability between initial, secondary, higher and continuing training and on the other hand take account of the different ways of learning (formal, non-formal, informal) and of the competence-based approach of companies. Reported activities include for example the promotion of prior learning assessment, the development of certificates and validation tools as well as the promotion of apprenticeship schemes be they for young people or adults.

Social partners also attached great importance to the improvement of the **financial regulations** in order to facilitate investment in the lifelong development of competences. Different co-financing tools were promoted by social partners ranging from providing allowances addressed to individuals, incentives for company investment, and managing sectoral funds to using available public funding possibilities such as the EU structural funds. Reports from social partners in the new Member States show that extensive use is made in particular of the European social fund.

Another main feature arising from the 2005 follow-up report is the involvement of social partners **to alleviate obstacles to competence development for individuals and companies**. Social partners across the EU share a concern to improve the efficiency and quality of existing tools and to develop tailored solutions to generate a positive attitude to competence development. Issues tackled differ according to the context in which social partners evolve and different means are used (collective agreements, joint projects, discussion fora, tailor-made initiatives) to reach this aim. Examples found in common in several countries include:

- measures to improve the **availability, quality and relevance of information** on labour market needs, evolving sector demands, companies' skills shortages, and learning opportunities for example through the development of "early warning" tools;
- measures to improve the **quality of learning opportunities**, for example through the development of widely recognized quality standards and/or labels;
- measures to increase **motivation** of companies and individuals, for example through raising managers' awareness on the importance of competence development for companies' productivity, developing flexible arrangements to make learning activities more compatible with work requirements as well as to increasingly tailor learning activities to the special needs of older workers, low-skilled, immigrants or the unemployed, and to improve the flexibility of public training provisions;
- measures to develop means of **validation of non-formal and informal learning**;
- measures to foster competence development in **SMEs** for example through pooling of expertise and building regional and/or sectoral networks.

## Chapter II - Follow-up of the framework of actions

## Austria

### Sources of information

- Workers: ÖGB (Austrian Trade Union Federation) and AK (Austrian Chamber of Labour), members of ETUC
- Employers: IV (Federation of Austrian Industry), member of UNICE; WKÖ (Austrian Federal Economic Chamber), member of UEAPME; CEEP Austrian section

### Actions taken at national level

At national level the Federation of Austrian Industry (IV), the Austrian Federal Economic Chamber (WKÖ), the Chamber of Labour (AK) and the Austrian Trade Union Federation (ÖGB) have been actively involved in several initiatives, which supported the objectives of the framework of actions. The main activities were as follows:

In 2003 OECD analysed the Austrian adult education system. The social partners formed part of the national steering committee. The country report was published in June 2004 and the Ministry of Education is planning a conference on the results and recommendations of that report. The social partners will present and discuss their concepts of lifelong learning (LLL) at the conference.

By taking into account the outcome of the OECD country report in Austria and the European Council's call to develop LLL strategies until 2006, the Federation of Industry continued its efforts towards an Austrian LLL strategy and started a comprehensive LLL process including companies, social partners and experts in the field. In March 2004 a LLL focus group with representatives from some of Austria's leading companies was set up at IV in order to work out a national white paper on LLL.

Several expert meetings, an expert round table and finally a LLL conference "LLL as a response to the new challenges for the education system" bringing together all main stakeholders in the field of education took place and their results and input were taken into account.

The LLL white paper was presented to the public in November 2004 and handed over to the ministers for education, economy and employment. It establishes the first comprehensive national LLL concept defining at its core 10 cornerstones of a LLL strategy for Austria and provides a proposal on a structure for its implementation (LLL taskforce). The publication is available at [www.iv-net.at](http://www.iv-net.at).

In addition, IV launched a pilot project on introducing an international quality standard in Human Resource Development (HRD) in order to support companies in their efforts to improve quality and effective investment in the development of human resources (see examples below).

Since there are more and more young people seeking apprenticeships in vain, the social partners were successful in establishing a so-called "safety net": For 2004/2005, 7,300 young persons can be trained in 10-month courses where they obtain the skills normally acquired in companies.

Furthermore, some apprenticeships have been structured in modules: there is a basic module of two years followed by one or more specialist module(s) of one year. This new structure has been developed by the social partners represented in the "Bundesberufsausbildungsbeirat" (Austrian vocational training advisory council).

For the disabled there is now the option to prolong an apprenticeship for 1 – 2 years (with final exam) or to obtain a "partial qualification" (which is certified). This new regulation has been negotiated by the social partners and is valid until 2008. An evaluation will decide upon the future of the programme. A crucial point will be the number of apprenticeships offered by companies for this special target group.

The educational division of the Chamber of Labour organised a total of eight conferences in 2004, focusing on the socio-economic influence of education and the crossroads to be taken, especially in initial education. Also, the results and implications of the new PISA study have been covered. At a kick-off conference called "Gegenstrom" ("against the tide") organised by the Chamber of Labour, the Trade Union Federation and the bfi (Austrian support institute / see note below), a new training programme especially designed for employees older than 45 has been introduced.

On quality assurance in adult education, a survey financed by the European Social Fund is being conducted by the two research institutes of the social partners, the öibf (Austrian Institute for Research on Vocational Training) and the ibw (Institute for Research on Qualification and Training of the Austrian Economy). The results should provide a good basis to develop a coherent system of LLL quality assurance in Austria.

In addition, The Chamber of Labour has developed and presented a new model for the co-financing of LLL: an income related training bonus which should be financed by the government. The formula is simple – € 750 minus 2% of annual gross income. This model focuses on low-income groups. For higher incomes a specific tax deduction incentive is already foreseen.

The Association of Austrian Trade Union Education (VÖGB) at the Austrian Trade Union Federation (ÖGB) is mainly responsible for the education of workers' representatives, such as members of works councils, through which they are supplied with the abilities, skills and knowledge necessary for their tasks within their companies.

Special courses are provided for specific target groups such as European Works Councils, Health & Safety Officers, employee representatives in supervisory boards, juries, members of youth councils, workers' representatives in social insurance, workers' representatives for the disabled, educational and cultural advisers and women. Most of the courses are organised in cooperation with the Chamber of Labour. In 2003 the VÖGB and its 20 member organisations offered more than 12,784 training activities and cultural events.

Note on bfi:

Owned by the Chamber of Labour and the Austrian Trade Union Federation, the bfi's activities focus on vocational education and training for the employed as well as educational and occupational schemes for unemployed persons. Most of the courses are based on modular systems. The bfi is certified in accordance with the international standard ISO 9001.

In 2003 14,858 courses comprising a total of 1,458,000 lessons (+5.4% compared to 2002) were held in all over Austria, and attended by 160,917 persons. 1,516 employees and more than 5,700 freelancers worked on behalf of the bfi. This makes the bfi the biggest employer of all the adult education institutes in Austria. Turnover in 2003 was almost € 115,000,000 (+5.5% compared to 2002).

New training schemes have been developed especially in the field of tourism, wellness and health. Beside the new EBDL (European Business Driving Licence) the ELL (European Language Licence) can also be obtained: This is a bfi certificate demonstrating language skills in English, French, Italian, Spanish, Hungarian, Czech or German as a foreign language.

### **Actions taken at company level**

- See below **Investors in People**
- **Wiener Stadtwerke**

A wide range of tools is used as follows:

- to identify and anticipate competences and qualifications needs
  - Computer based methods: employees have to answer questions for instance about their behaviour in specific situations - to identify employees' skills, talents and potentials
  - Customized Assessment Centers, Development Centers and Hearings (in particular on higher qualification levels)
- to recognise and validate competences and qualifications
  - Computer supported methods to describe and evaluate requirements, performance and ratings based on MbO (Management by Objectives)
- to inform, support and provide guidance
  - Leadership guidelines for basic orientation
  - Intranet: Employees are provided with information about all matters of interest, including lectures, organised by the human resources development department of Wiener Stadtwerke group; same information is also spread via printed catalogue.
  - Workshops and customized development projects adjusted for particular purposes
  - Courses for apprentices in addition to the obligatory vocational school
  - Special measures on subsidiary company level to support learning "near the job"
- to mobilise resources

- Incentives (rewards) for extraordinary performance and achievements (currently in an implementation phase)

### **Good practice examples**

- **IV pilot project Investors in People**

Supporting companies through international expertise, the Federation of Austrian Industry has introduced the internationally recognised standard 'Investors in People' (IIP) in Austria. The standard is one of the most developed, experienced and useful tools in supporting companies in their HRD efforts. IIP is a certified framework to improve performance, to make better use of the company's human capital and to further develop human resources. It supports companies' efforts to invest effectively in its people.

The pilot project, supported by the European Social Fund (ESF), started in March 2004 and supports 12 companies ranging from private services to public service, industry and biotechnology to achieve the IIP label by 2006. The project was selected as an example of good practice for ESF in action. Further information is available at [www.investorsinpeople.at](http://www.investorsinpeople.at)

- **The Learning Voucher of the Chamber of Labour**

In 2002 the Chamber of Labour (the legal representation of all Austrian workers and employees with obligatory membership) launched a new initiative, the "AK Bildungsgutschein" (Learning Voucher of the Chamber of Labour) with a value of € 100 a year. The voucher can be used for specific courses at selected training providers.

The second evaluation of the Learning Voucher in Vienna showed that 24% of the participants took part in a course for the very first time (compared with 18% the year before). This shows very clearly, that the voucher has become an effective instrument to motivate people for LLL. Every sixth employee (16%) in Austria uses the voucher for his privately financed training. The lower the income, the less the formal qualification, the more often the voucher is used.

- **E-Learning Courses**

Since 2003 all representatives and members of the Austrian Trade Union Federation (ÖGB) who cannot attend seminars, have the possibility to participate in e-learning courses. Topics referring to worker participation, labour and social law, economy, politics, European issues, media and computer application, are provided in these courses.

# Belgium

## Sources of information

- Trade unions: FGTB-ABVV (General Federation of Labour in Belgium), ACV-CSC (Confederation of Christian Trade Unions) and CGSLB (General central of liberal trade unions of Belgium), members of ETUC
- Employers: VBO-FEB (Federation of Belgian enterprises), member of UNICE ; UNIZO (Union of self entrepreneurs) and UCM (Union of middle classes), members of UEAPME

## Introduction

The Belgian social partners have their own competence for continuing training of workers within the company, which enables them to define and implement autonomously a training policy that is genuinely adapted to the needs of companies and realities on the labour market.

This policy involves the various organisational levels of the social dialogue, i.e. cross-sectoral, sectoral and/or company level:

- At cross-sectoral level this takes place in the framework of cross-sectoral agreements negotiated every two years by the social partners and which determine companies' overall vocational training effort as well as the priority direction of policies to be implemented by sectors and companies. These agreements are now firmly embedded in the European employment strategy.

- Sectors are an essential cog for giving concrete form to and implementing the provisions of cross-sectoral agreements on lifelong education and training:

- The collective labour agreements concluded in execution of each cross-sectoral agreement determine the contribution to be made by companies in the sector to the overall training effort as well as the thrust of the sector's training policy, in terms of both the continuing training aspect and the aspect of groups at risk. The autonomy enjoyed by the sectors in this framework allows them to organise their own training structure which is particularly suited to addressing the specificities and requirements of companies and workers in the sector while following the general guidelines identified at cross-sectoral level.
- It is also at sectoral level that the social partners, under a bilateral management system, administer the funds and/or training centres created to finance and organise training courses for workers in companies in the sector and jobseekers seeking work in the sector.

- Lastly, as the main contributor to and beneficiary of this policy, the company is a key element of this apparatus, in which the collective labour agreements it is able to conclude can be incorporated in some cases.

It should also be pointed out that, apart from this important autonomous role in the framework of their own competence, the social partners are also closely involved, at both European and national level within their own area of responsibility, in definition and implementation of continuing education and training policies.

This joint national fiche has been prepared in good cooperation between the social partners at the level of both the federal state and the federated bodies. It comes at the end of a two-year cycle which has seen implementation of the 17 January 2003 cross-sectoral agreement through a large number of sectoral and/or company collective labour agreements. Hence, the measures mentioned in the previous national fiche are often still in the course of implementation. A new cross-sectoral agreement for a further two-year cycle (2005-2006) is currently being negotiated.

### **Action taken at national level**

- **to identify and anticipate competence and qualification needs**

It should be recalled that the agreements concluded between social partners and federal government at the National Employment Conference in October 2003 relate notably to an inflow into professions where there is a labour shortage. Particular provision was made for a strengthening of training efforts.

Specifically, these efforts often bring together on the ground funds and/or sectoral training centres and public training operators in order to ensure a link between the training offer and the sector's needs. Skills centres also play an important role in this regard. It emerges from reports submitted by sectors in March 2004 that there were 44,946 sectoral training courses concerning a critical function in 2003.

- **to recognise and validate competences and qualifications**

The 24 July 2003 cooperation agreement on validation of competences in the field of continuing vocational training, concluded between the Francophone Community, the Region of Wallonia and the Committee for the Francophone Community, and the 30 April 2004 Flemish decree established the legal framework needed for implementation of the validation process. The social partners at cross-sectoral and sectoral level have been involved in work – soon to be completed – in both the North and the South of the country on drawing up preliminary lists of priority skills areas.

- **to mobilise resources**

It should be recalled that the Belgian social partners confirmed in the most recent cross-sectoral agreement dated 17 January 2003 and during the National Employment Conference held in October 2003 their commitment to reaching a total training effort by companies equivalent to 1.9% of total payroll costs by the end of 2004. This commitment was to be made a reality while maintaining the specific effort of 0.10% earmarked for employment and/or training of persons in groups at risk

It should also be recalled that the social partners also undertook at the National employment Conference to ensure that every second worker should receive training by 2010; all the persons concerned were to make an effort to ensure that an extra

60,000 workers a year receive training. Efforts are currently being made with a view to achieving these objectives.

Particular emphasis was placed at the Conference on improving follow-up of training actions. The National Labour Council and the Central Economic Council have thus been entrusted with the task of developing a simple but accurate instrument, i.e. one which takes account of all training actions developed by companies. Work on this point by the two Councils has resulted in an agreement of principle on a new scoreboard for follow-up of training actions (a formal agreement will soon be in place).

In addition, the bilateral committees had been asked to submit a report by 31 March 2004 concerning compliance with their sectoral agreements and measures to achieve the agreed objectives as well as the distribution of training efforts by category, age and educational level of workers. In the framework of this reporting exercise, the National Labour Council issued recommendation n° 16 dated 27 January 2004 on reporting of sectoral training efforts (see annex 4). This recommendation seeks to inject a degree of harmonisation into the processing of sectoral data relating to training.

A first evaluation was carried out between the social partners and the government on the follow-up to this recommendation (see annex 2). Around sixty reports were drawn up in this way, covering almost 75% of employees, thus illustrating the involvement of the social partners in a new dynamic.

Lastly, at regional level, the Walloon employment service has developed since 1998 a network of skills centres. These centres are articulated around the activities of a specific sector and are therefore generally set up close to companies in that sector. They dispense training courses based on the most advanced technologies in the sector and work with all the players concerned: the employment service, sectoral organisations and educational bodies. In a number of sectors, universities and research centres are also associated. The skills centres dispense training courses to CEOs in the sector, jobseekers and schools. In this way, they succeed in matching the training service offer with the needs of the labour market. These centres also play an important role in the area of critical functions. They can give information on the sector and they promote jobs linked to the new technologies among their target public. The centres are brought together in a network by the employment service. Skills centres are also organised in Flanders, at the level of VDAB, and in close liaison with the sectoral social partners.

Generally speaking, these centres allow a pooling of resources by the different players with a view to anticipating, monitoring and meeting the training needs of companies in the different sectors.

### **Action taken at sectoral level**

- **to identify and anticipate competence and qualification needs**

Some sectors develop initiatives directly geared towards identification and anticipation of competence and qualification needs:

- In 2003, the social partners in the banking sector launched the Compas initiative (skills in the area of insurance). This is a guidance instrument that workers in the sector can use to determine what skills can be developed with priority;
- In the textiles sector, CEFRET, the sector's bilateral centre, is carrying out telephone and paper surveys and visiting companies in the sector in order to find the right orientation for the content of the training courses on offer in the sector.
- In 2003, Cefora (training centre of the national auxiliary bilateral committee for employees) examined the structure of professions in the wholesale sector. For companies, this is a practical instrument for describing vacancies in more specific terms and for refining their internal training policy.

It should also be recalled that the social partners are associated with the skills centres which can direct jobseekers towards the skills in demand in the sectors.

- **to recognise and validate competences and qualifications**

Sectors have been encouraged to validate training through sectoral certification systems or "vocational training passports". The social partners at cross-sectoral and sectoral level are closely involved in work currently under way in the framework of the new rules for skills validation which should soon result in the drafting of preliminary lists of priority skills areas (see above).

- **to mobilise resources**

a) General

The sectors play an essential role for realising the objectives set in the framework of the most recent cross-sectoral agreements or in the framework of the October 2003 National Employment Conference (see above). The policy defined by the social partners at cross-sectoral level is based on sectoral training structures. Bearing in mind the autonomy left to the sectors, these structures can vary depending on the branch of activity under consideration.

However, they most often take the form of training funds and/or training centres funded with resources coming from specific social contributions levied on wages in general on the basis of collective labour agreements, i.e. instruments that are the fruit of consensus between the sector's social partners. A training credit system makes it possible to simplify the management of vocational training for workers by companies is in place in some sectors.

The content of policies implemented via these structures is also variable. Generally, for example, these policies can consist of:

- Collecting additional contributions at sectoral level (or increase in existing contributions) earmarked for financing new vocational training initiatives, via the social fund or the sectoral training fund.
- Determination of a certain percentage of the work timetable that should be devoted to vocational training programmes.

- Establishment of concrete training and work programmes targeting certain groups.
- An undertaking to make an additional training effort, subject to monitoring by the works council or trade-union delegation and evaluated at sectoral level.

In the framework of the October 2003 National Employment Conference, sectors were asked to report by March 2004 on their training efforts. It emerges that, of the sixty sectors that submitted a report by March 2004, forty-three have developed a training service offer for workers, thirty-one in the framework of education, thirty for jobseekers and twenty-seven for employers.

On this basis, the sectors in 2003 trained 254,208 workers (with training courses lasting an average of 19 hours), 11,314 jobseekers (average of 381 hours), 6,022 students signed up for an alternance-based scheme and 32,947 full-time secondary school students. It should be noted that 44,946 training courses out of the total concern a critical function.

#### b) Examples of sectoral initiatives

Among the many initiatives developed at sectoral level, mention should be made, by way of example, of the following initiatives:

- **Banking sector:**

The collective labour agreement provides for development of a right to training for each worker. In small and medium-sized banks, this right is two days a year. In large institutions, this right increases to three days. In order to stimulate and support this plan, the elanplus initiative ([www.elanplus.be](http://www.elanplus.be)) has been created. Among other things this initiative allows free participation in seminars on various subjects linked to the banking sector.

- **Cleaning sector:**

In partnership with literacy associations (reading and writing), the sector's social partners have agreed on establishment of free training courses for workers during working hours and without loss of pay. The aim is to teach workers in the sector to read and write and not to be embarrassed about their difficulties.

- **Workers with employee status covered by the national auxiliary bilateral committee for employees (CPNAE or CP 218):**

The 15 May 2003 sectoral agreement gives the right to a minimum of four days of training in the period 2004-2005. The training may be internal or external. In concertation with the trade-union delegation, the employer may introduce its own training plan or build on a standard and additional sectoral plan. If the training takes place outside working hours, the employer must grant the employee equivalent compensation in working time. If the employer has not proposed sufficient training days by the end of the period covered by the collective labour agreement, the worker will be given one extra day of paid leave for each day of training not taken.

Cefora (this sector's training centre) organises the "check-up 45+". This is a voluntary and joint initiative involving one or more employees aged 45 and over and their employer with a view to a screening by an external consultant of these workers' specific training needs. This skills enhancement action places emphasis on seeking out the skills and capabilities of these workers with a view to proposing training courses deemed likely to anticipate changes.

Cefora has trained 3,717 jobseekers including 714 for functions in wholesale trade, which are particularly difficult to fill. Almost four out of five participants have found employment within six months, around half of them with an indefinite contract. Industrial apprenticeship has attracted 312 students in three years. Fifty-five apprentices were awarded a certificate in 2003 and 70% of them have found work, inter alia as warehousemen, goods handlers in the wholesale trade or as counter salesmen.

- **Hairdressing and beauty-care sector( CP 314):**

Establishment within the sector of a very structured training system which influences pay without affecting job classification systems. This training takes the place of the courses generally offered by brands of products specific to the sector. Creation of a qualification card for each worker, serving not only to record training credits but also to monitor them. The system is managed by the sectoral employment security fund which grants an additional end-of-year bonus to workers as a function of training hours taken up. Training courses are closely linked to the tasks to be performed (hair-dressing or beauty-care or communication techniques) and can be taken with recognised training agents whose names are accessible to training candidates via a website, which they can access using a password (<http://www.coiffure.org/>). The system involves training institutes and takes account of the needs of trainees in the sector.

- **Paper manufacturing sector:**

Almost 9 % of firms exercised their right to draw on the fund build up with the contributions paid by companies belonging to this sector. In this way, more than 2,500 workers benefited from training. The training effort in this sector was 2.62% of total payroll costs in 2003.

- **Construction sector:**

The emphasis was placed on flanking new workers with little experience by placing them under the tutelage of an experienced worker within the company.

The duration of this tutelage with a view to training varies from one to six months. In this way, three thousand "godfathers" devoted an average of two hours a day to flanking young starters in the sector. In parallel, training fund resources have been devoted to various types of training actions.

1) 350 tutelage contracts have been concluded between the sectoral fund and affiliated companies; flanking within the company is complemented by courses lasting one or two weeks in a training centre.

2) Organisation and financing of paid alternance-based training schemes (two years) for young people between 16 and 25 years of age (1,400 contracts a year); this is co-financed by the company in question and the sectoral fund.

3) Follow-on training courses organised by the sectoral fund in a centre approved by the latter and in concertation with companies (17,000 beneficiaries in 2003).

4) Intense cooperation with vocational and technical schools via partnership agreements.

5) Payment of bonuses to jobseekers and to training centres for cases involving retraining in a construction-related trade.

Altogether these actions represent around 2.2% of total payroll costs in the sector; this percentage does not include actions taken by individual companies.

- **Insurance sector:**

More than 3,400 persons employed by 40 companies in the sector benefited from a training course paid for out of the sectoral fund. In addition, for many years the sector has endeavoured to develop recruitment and training of young jobseekers. In the framework of the 2003-2004 agreement, the insurance sector has undertaken to recruit 150 jobseekers for a total duration of one year, and to organise for them complementary training during working hours for a duration of three months with a view to a subsequent job in the sector. Realisation of this plan is evaluated regularly in the bilateral committee. Lastly, under the 2003-2004 sectoral agreement, a training credit of four days a year (internal or external) was determined collectively at the level of the company in 2003 and 2004. This credit increased from three to four days in the latest sectoral agreement. It involves a "shared pot" which will be distributed as a function of workers' real needs. A report on this subject is presented each year to works councils.

- **Textiles sector:**

The sectoral fund financed with employer contributions partially reimburses to companies the costs associated with training their personnel (drawing rights) within the limits of their contributions and on the basis of a training plan.

En 2003, almost 368 companies introduced a training plan in this way.

In addition, training courses are organised and financed from the textiles sector's training fund; in 2003, 142 companies participated in this action for blue-collar workers (41% of them SMEs) and 137 companies for white-collar workers (39% of them SMEs).

Cooperation agreements have been concluded with the public training centre (VDAB) as well as with individual companies with a view to providing workers in the sector with training.

A particular information effort using different channels (circulars, mail, specialist magazines) on the existence of these various instruments was made by the employer federation "Febeltex", notably targeting companies but also other organisations likely to be concerned by these training courses.

- **Steel-making sector:**

According to the annual survey carried out in companies and whose results are evaluated on a bilateral basis by the social partners in the sector, it emerges that 588,790 training hours have been taken up by blue-collar workers in the sector, equivalent to 2.7% of the total hours worked by this category of workers. The cost of this training represents 3% of the total payroll costs of the workers concerned.

### **Actions taken at company level**

#### 1) General

Apart from financing sectoral training, companies participate increasingly actively in vocational training policy:

- Collective labour agreements concluded at company level can implement a sectoral agreement or, in the absence of a sectoral collective labour agreement, apply directly the provisions specified at cross-sectoral level (notably regarding the obligation vis-à-vis groups at risk).
- Close cooperation is organised in certain cases between the sector and companies on definition of objectives and means to be deployed for worker training. For instance, some collective labour agreements make provision for companies to draw up a training plan.

Arrangements for adoption and follow-up of the training plan may vary depending on the sector. However, these plans are generally discussed and drawn up in the framework of an agreement between the employer and the trade union delegation (often in the works council).

Approval of the training plan by the social partners at sectoral level is sometimes also required and may then be given by the sectoral training fund or training centre

If the company does not have a trade union delegation, a subsidiary sectoral plan can be put in place at sectoral level (e.g. prepared by the sectoral training fund). Sectoral collective labour agreements sometimes also specify in this case that the company plan must be submitted for prior examination by a bilateral body outside the company (e.g. regional contact committee).

Where it is provided, the vocational training plan is necessary to obtain the grants earmarked at sectoral level. Adherence to the plan is verified by the sector.

#### 2) Specific actions

In the area of good company practice, attention is drawn to the following:

- A trade union organisation has developed a toolkit comprising practical fiches with a view to negotiation of training plans in companies. This action is based on the principle that a right to lifelong learning must be granted to all workers inside or outside companies via a training plan to be drawn up in

concertation between the social partners. This action falls within the framework of giving concrete expression to the training efforts defined at the level of utilisation of the employer contribution of 0.10% for groups at risk and the employer commitment to devote 1.9% of total payroll costs to in-company training. Three fiches relate to the objectives (0.10%, alternance and training plan with the objective of retraining and continuing training) and two fiches deal specifically with the in-company training plan.

- A trade union organisation has developed for use in the metal-working sector an internal vocational training code based on the following rights: right to vocational training for access, maintenance, development and retraining in employment, right for all workers, vulnerable young workers, older workers, women, immigrants, low-skilled, temporary, etc., right to fair vocational training, i.e. realised in the framework of collective negotiations, without loss of pay and adapted to workers' needs in terms of content and methodology.
- In dialogue with VDAB, UNIZO this year started the project "Néerlandais sur le lieu de travail" (Dutch language in the workplace) in SMEs. In the framework of this project, SMEs can offer Dutch language training at the workplace to their workers who do not speak Dutch and are usually of foreign origin.

### **Examples of good practice**

See points II.B.3.C (sectoral practice) and II.C.2 (company practice)

## Cyprus

### Sources of information

- Trade Unions: SEK (Cyprus Workers Confederation), member of ETUC
- Employers:; OEB (Cyprus Employers & Industrialists Federation), member of UNICE; CCCI (Cyprus Chamber of Commerce and Industry), member of UEAPME

### Actions taken at national level

- **to identify and anticipate competences and qualifications needs**

In Cyprus this is primarily done through the Human Resource Development Authority (HRDA), as far as the adult population is concerned, i.e. the target group of interest to employee and employer organisations.

The HRDA's mission is to create the necessary prerequisites for the planned and systematic training and development of the human resources of Cyprus. The main strategic objectives of the HRDA for 2004-2006 include inter alia:

- Participation in the formulation of a national strategy for the promotion of lifelong learning.
- Adjustment of the training system to the needs of the labour market with the improvement of the quality and effectiveness of training provided.
- Formulation of an integrated policy and promotion of the gradual establishment and operation of a System of Vocational Qualifications in Cyprus.
- Conducting research studies and surveys.

The social partners in Cyprus (employer and employee organisations) participate in the Board of the HRDA and hence in the decision-making process of the Authority which is a semi-state organisation by nature and operates on a tripartite basis.

The actions that the HRDA takes to identify and anticipate competence and qualification needs are:

- Analysis of the changes in the labour market through research studies on issues of strategic importance, which examine particularly human resource development, issues at the level of the economy, the level of economic sectors and occupational categories. Emphasis is also placed on employment forecasting. A study entitled "Employment Forecasts in Cyprus 2000-2010" was completed and published in 2004. The study covered 27 sectors of economic activity and 36 occupations.

Additionally, on the basis of the same methodology, a short-term forecast study was published in 2004 entitled "Employment Forecasts in Cyprus 2004 & 2005" for the 27 sectors of economic activity and 36 occupations.

- Annual investigations for the identification of skill needs with the involvement of the social partners. Such a study was carried out in 2004 as well.
- Preparation of an annual document (in consultation with the social partners) that contains the thematic priorities for multi-company training programmes. Such a document was prepared for 2004 as well.
- Conduct of human resource studies focusing on the characteristics of selected groups such as the employed, the unemployed, the economically inactive, women, etc. Such studies were conducted in 2004 as well. In addition, the implementation of schemes (co-financed by the European Social Fund (ESF) to provide, through personalised guidance, core skills to disadvantaged groups such as the unemployed, economically inactive women and young secondary school leavers.

In addition, the social partners also conduct annual surveys amongst their members to identify their training needs so that they can proceed with the provision of the necessary training. Such surveys were conducted in 2004 as well.

- **to recognise and validate competences and qualifications**

The HRDA has responsibility (by law) for the promotion and gradual establishment of a System of Vocational Qualifications. More specifically, the law clearly places power and authority on the HRDA to "set standards of vocational qualifications for any category or categories of persons employed, provide for the assessment and issue the relevant certificates of vocational qualifications".

The assessment of the findings of a special feasibility study, the formulation of an integrated policy and the promotion and gradual establishment of a System of Vocational Qualifications in Cyprus, in cooperation with all other competent agencies, is one of the Strategic Objectives of the HRDA for 2004-2006, formulated on the basis of Cyprus's strategic goals.

The feasibility study was conducted in 2004 and a monitoring committee was formed in which all the social partners participated.

In addition, the Cyprus Chamber of Commerce and Industry is operating a scheme in Cyprus (the only one of its kind run by a Cypriot organisation) whereby it certifies competence in a number of computer-related subjects (e.g. word-processing, spreadsheets, databases, presentations, etc.) through professional examinations conducted by it.

- **to inform, support and provide guidance**

The social partners are primarily involved in the relevant activities of the HRDA, through their participation in its Board of Directors.

The HRDA has prepared a web page with information and advice on training opportunities. The HRDA also displays its research studies on the labour market, which include medium-to long-term occupational forecasts up to 2010. The HRDA presents the results of such studies and information on its schemes and the options

available to parents, to secondary school students and to young secondary school graduates doing their service in the National Guard. Moreover, the HRDA, through its Consultancy Services Scheme, aims at increasing the productivity and improving the competitiveness of enterprises through the development and better utilisation of their human resources. This scheme helps enterprises identify the training and development needs of their human resources and prepare/implement a training plan.

In addition, the social partners inform and provide guidance to their members on a regular basis concerning the training opportunities that are available in Cyprus.

- **to mobilise resources**

The activities of the HRDA are financed by the Human Resource Development Fund where enterprises are obliged to pay a levy amounting to 0.5% of their total payroll. The funds are mainly used to subsidise initial and continuing vocational training for the employed as well as other developmental activities. In 2003, HRDA's total expenditure was £5.3m (€9.1m), out of which £4.8m (€8.3m) represented expenditure on training activities.

A new form of funding is the co-financing of vocational education and training measures with the ESF as formulated in the Single Programming Document for Objective 3 - Human Resources for 2004-2006. As far as training is concerned, three new schemes will be developed and put in operation by the HRDA, to be co-financed by the ESF (50-50%). These schemes aim to promote the training and employability of young secondary school leavers, the unemployed and economically inactive women.

In addition to the levy paid to the HRDA, it is estimated that the employers in the private sector spend an additional 1-1.5% of payroll on training measures for their staff.

Finally, the government as an employer finances the training and development of civil servants. It is estimated that an amount of £0.5m (€0.87m) was expended in 2003 for this matter.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

These mostly include the relevant HRDA activities that deal with sectoral research / analysis as outlined above.

In addition, a number of sectoral associations, e.g. Association of Cyprus Travel Agents, Cyprus Hotel Association, Association of Commercial Banks, Cyprus Association of Certified Accountants, Cyprus Federation of Business and Professional Women, etc. conduct regular research amongst their members with a view to identifying their training, competence, qualifications needs.

- **to recognise and validate competences and qualifications**

A good example in as far as recognition and validation of competences and qualifications are concerned, comes from the banking sector.

The Cyprus Association of Commercial Banks, with the agreement of the Bank Employees Union of Cyprus, recognises the qualifications awarded by the Chartered Institute of Bankers of England and Wales and the American Institute of Bankers, as well as the Documentary Credits Certificate awarded by the International Chamber of Commerce. This recognition leads to salary increases and promotions.

In addition, the certificates awarded by the Cyprus Chamber of Commerce and Industry certifying competence in computer-related subjects are recognised for employment purposes by leading companies and organisations in Cyprus.

- **to inform, support and provide guidance**

The sectoral associations mentioned above provide relevant information and guidance services to their members.

- **to mobilise resources**

Resources in Cyprus are mostly not mobilised at sectoral level but at national level through the levy to the HRDA as mentioned above.

It is however mentioned that employers in the private sector are estimated to spend 1-1.5% of their payroll (in addition to the HRDA levy) on training measures for their staff, while the government as an employer also finances the training and development of civil servants. It is estimated that an amount of £0.5 m (€0.87m) was expended in 2003 for this matter. Also the large commercial banks systematically dedicate a share of their budget for the training and development of their employees.

### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs**

The major banking institutions of Cyprus through their competent departments are continuously monitoring the training/skills needs of their personnel, particularly in light of the changes taking place in the banking/financial services environment, and provide the necessary training to their staff on a systematic basis.

- **to recognise and validate competences and qualifications**

The example of best practice is again from the banking sector. The sector as a whole but also the individual banks recognise the qualifications mentioned in the relevant part of "Actions taken at sectoral level" above.

- **to inform, support and provide guidance**

The leading banking institutions in Cyprus do provide such information and guidance services to their staff.

- **to mobilise resources**

As already mentioned, the large commercial banks dedicate a share of their budget for the systematic training and development of their employees.

### **Examples of good practice**

The best practice examples at sectoral and company level come from the banking sector in all areas, i.e. identification of competences and qualifications needs, recognition of competences/ qualifications, provision of information/ support/ guidance, mobilisation of resources. Sections 2B and particularly 2C above provide details.

In addition and in as far as the national level is concerned, the best example is the existence of the HRDA itself which is effectively entrusted by law with the lifelong development of competences and qualifications and which represents social partnership in practice through its structure and composition. Amongst the notable activities of the HRDA is the subsidisation of training programmes, (accelerated, initial and continuing) the co-funding of the Apprenticeship System in Cyprus, the considerable research activity it undertakes, the Training Infrastructure Support Scheme it operates (aimed at strengthening the training infrastructure of companies and training institutions), the Consultancy Services Scheme that aims at increasing the productivity and improving the competitiveness of SMEs through the development and better utilisation of their human resources, its truly informational website and the activities for the development of a Competence-based System of Vocational Qualifications.

## Czech Republic

### Sources of information

- Trade unions: CMK OS (Czech-Moravian Confederation of Trade Unions), member of ETUC
- Employers: SPCR (Confederation of Industry of the Czech Republic), member of UNICE; Union of Employers' Associations, member of CEEP

### Introduction

The basic problem in the Czech Republic is still the lack of regulatory framework concerning lifelong learning (LLL) and continuous education. Neither has a clear and standard interconnection and link between initial and continuous education developed. There is no integral formalised system that would recognise and validate the results of non-formal and informal education which would lead to an increase in job opportunities and flexibility of individuals on the labour market. These facts must be taken into consideration as they strongly influence the development of the joint national report for the Czech Republic at all levels (national, sectoral and company level).

### Actions taken at national level

In 2003, the Government Council for Human Resources Development in the Czech Republic was established by the Czech Government and, as one of its main tasks, the Council initiated the development of proposed draft legislation on lifelong learning. The Government legislation plan foresees that the Ministry of Education drafts this piece of legislation by the end of 2004 and then presents the full proposal to the Government in the first half of 2005.

So far the draft legislation has been consulted on with the representatives of professional associations, employers, trade unions, regions and Ministries. It has also been discussed internally at the Ministry of Education and it is now in the phase of a public debate. Social partners still have the opportunity to participate in this debate and thus influence the formation of the new law, especially by participating in the working group of the Council of Economic and Social Agreement of the Czech Republic (CESA) for education and human resources development.

According to the national strategy of the CESA and the strategy for human resources development, new regional CESA working groups are being gradually established, along with the regional Councils for human resources development. The main task of these groups of social but also of other partners is to initiate, coordinate and secure cooperation between local government bodies and state administrative authorities, labour offices and social partners leading to and providing information systems (IT) and material resources.

An inseparable part of the social partners' work in the area of competences and qualifications is their participation in the sectoral groups meeting at the National Institute of Technical and Vocational Education (NITVE) which is one of the working units of the Ministry of Education. The work and programme of these sectoral groups is in accordance with the Statute agreed on by the social partners in the CESA working team for education and human resources development. The sectoral groups have been established to increase effectiveness and cooperation between relevant partners in the area of vocational training, representatives of labour and education areas. Their task is to monitor the development and changes in the various job and workplace positions and their qualification requirements. They participate in the development of professional profiles and also supervise the coherence of qualification requirements with the proposals of the new educational programmes. At present there exist 25 such sectoral groups with approximately 270 members.

- **to recognise and validate competences and qualifications**

The Department of Administration of Employment Services of the Ministry of Labour and Social Affairs (MLSA) has been the first to address the area of recognition and validation of skills and competences in relation to the Labour market, in cooperation with Trexima which has developed a wide circle of cooperating practice experts that have been preparing the so-called "Information system of typical positions" for five years now. This system is now in the last stages of preparation – meaning that it is being tested practically by the Labour offices. It is based on an analysis of qualification segments of more than 1,600 professions and occupations in order to compare the available job opportunities with the available workforce with the appropriate qualifications and thus choosing the most suitable candidates for a job and vice versa.

Another part of this project is also the harmonisation of school-leavers' competences with the professional practice requirements and continuous training. Incorporated in the project is also the so-called "European Curriculum Vitae", which aim is to provide the possibility of an international comparability of candidates' qualifications from various EU Member States. Many employer but also trade union experts have participated in the development of this project.

Related to the development of the draft legislation concerning lifelong learning and vocational education and training (VET), the National Qualifications Framework (NQF) is being prepared by the NITVE. The National Qualifications Framework is derived from the National Profession Framework, administered by the Ministry of Labour. The NQF will contain the list of comprehensive and partial qualifications, their name, symbol, mutual relations, relationship to the National Profession Framework, contents and description. The NQF will be managed by the NITVE. The NQF is being prepared by the NITVE as a systematic project within the framework of the European social fund (ESF), as a project based on the European strategy on the learning society and lifelong learning and on the national programme for education development in the Czech Republic.

On 1 October 2004, the National Contact Point (NCP) opened and started working as a national implementation body for the Europass scheme. Its work is being

managed jointly by the National Institute of Technical and Vocational Education (NITVE) of the Ministry of Education and the Centre of University Studies. An important role in all these activities is naturally played by the social partners from both the employer and employee sides.

- **to foster mobility**

In relation to the opening of the NCP for Europass, the social partners are preparing for the political process of the introduction of the new "Europass Mobility" tool which should take effect in the first semester of 2005 and which also means transforming the NCP into the National Centre for Europass (NCE). One of the main tasks now is to distribute and spread information concerning this tool and provide help and support to all the people interested in this area. The NCE will closely cooperate with the social partners and labour offices, etc., in the area of counselling.

On the basis of a social partners' agreement, a conference focusing on Europass is being prepared for the first half of 2005, under their management. However at present, the main role in the provision of counselling and guidance stays within the labour offices supported by the Ministry of Labour, especially by the Administration of Employment Services. The Czech-Moravian Confederation of Trade Unions (ČMKOS) and the Confederation of Industry of the Czech Republic (SP CR) both use their own Internet and Intranet systems as well as educational and counselling systems to provide the necessary information in this area.

- **to mobilise resources**

Regarding the mobilisation of resources for lifelong learning and continuous education, a new working group has been established within the Government Council for Human Resources Development; it is composed of social partners and other relevant experts and tasked with the development of individual proposals to be submitted later to the Czech Government.

Results of the working group debate:

- To develop a system for the financing of LLL and VET making it possible to distribute the financial burden on employers, employees and state administration and therefore not expecting the employers to be the only sector providing financial support in this area:
  - To motivate employers with the possibility of using a preferential tax (tax assignation, education investment deduction from overall tax duty and reimbursement of certified programmes from tax payments);
  - To initiate the development of an educational fund within CESA based on the percentage part of the wages paid. The rules for its establishment and use are to be specified by legislation.
  - To motivate employees to co-finance their own education and training by the deduction of investment into education from the basic income tax (similar to the mortgage support tools).
  - To motivate employees to adopt an active approach to lifelong learning as an indispensable basis for a flexible and widely employable workforce.

- To legislatively ensure that employees receive time off for training, including wage compensation (a workers' right) as an important motivation aspect for education.
- To support the internal employer programmes for human resources development using tax relief.
- To contribute to the development of an efficient motivating environment for employers by providing focused training programmes which will be a benefit for business activities and will thus support the interest of LLL and VET, e.g. training programmes concerning the current changes in legislation, etc.
- To amend Law No. 140/1968 Coll., on "workplace concessions and economic support of employees who study along with their job" to bring it into line with the subsequent regulations, in order to provide and promote a possibility to better use LLL and continuous training, to motivate both participating parties and to allow the specified percentage of the tax directly for employment policy to be used for educational purposes following specified and precise conditions.
- To increase the possibility to use both short-term and part-time employment, especially with regard to school-leavers, job candidates or possibly the use of secondary school students, who could substitute an employee undergoing company training (study), to use job rotation, job sharing, etc., and in this respect, to amend the respective legal regulations.
- To support employer initiatives leading to the development of the LLL system in such a way as to make it effective for the employer needs through:
  - the requirements concerning the vocational and qualification conditions;
  - participation in the theoretical and practical preparation in schools;
  - participation in defining the needs for retraining;
  - following the procedure to achieve inter-connecting the education and training systems/categories (sector-topic-findings/knowledge) with the systems related to the enterprise environment (sector-activity-product/service);
  - involving the employers in the evaluation of the educational outcomes within the school system and in the evaluation of the quality of educational programmes;
  - initiating a strengthening of employers' role as social partner in the regional context;
  - supporting development of the validation system for non-formal education.
- In order to achieve all these aims, to make particular use of the available support from the ESF and also partly from the European Regional Development Fund (ERDF) thus providing sufficient economic incentives.

### **Examples of good practice**

At the beginning of 2004, the **Czech-Moravian Confederation of Trade Unions (ČMKOS)** adopted its own Human Resources Development Strategy in which three fundamental priorities were specified:

- workforce mobility
- competitiveness of companies
- lifelong (continuous) learning and education

The above-mentioned priorities were also, at the preparation stage, incorporated into the document "Implementation of human resources development strategy in the Czech Republic". ČMKOS has strengthened its position and role and has become an

initiator of a whole range of proposed activities of the Government Council of the Czech Republic.

In the second half of 2004, the **Confederation of Industry of the Czech Republic (SP CR)** developed in cooperation with the SP CR Institute (ISP) its own Human Resources Development Strategy. The basic points of this strategy are:

- an effective operation of education as the basic stage of the LLL system,
- a system of further educational training
- a wide range of economic and legal tools promoting and supporting employers' interest to carry out the system of further professional training for their employees.

For these main priorities the strategy contains proposals on how to achieve them.

In the **energy sector**, principles of mutual cooperation between power companies and vocational schools providing training for these professions in the framework of the Czech Association of Employers in Energy (CSZE) were adopted. This measure facilitates cooperation particularly at the regional level. At national level a certified unified system of final apprentice exams for graduates of electro-technical professions was established. This system is compatible with the dual and modular system used in the EU and the national certification system makes it possible to compare qualifications at international level.

Within the sectors affiliated to the **Union of Employers' Associations**, the best educational system exists in the printing sector: The required qualification demands are formulated in relation to the technical progress of printing technology and the teaching and study curricula are adapted to these demands, both at the secondary printing apprentice schools and the higher special school for printing. The printing sector has its own university in the city of Pardubice, whose graduates conclude their studies either as Bachelors (Bc.) or as Magister (Mgr. – Master of Arts equivalent) The verification of qualifications is addressed by recognising the competences of individual schools by the association of printing enterprises (SPP). The so-called "Integrated system of education in printing industry" is in this way both accredited and also supervised by the association. Information and consultation is provided by the association in the form of its own plan of vocational actions, at the following levels:

- standard organised vocational actions, conferences and seminars;
- providing the necessary information for the association's affiliates via Intranet;
- organisation of vocational actions including publications according to practical needs (technical printing of journals and publications).

Financial support is provided by multiple sources: from the association of printing enterprises itself, from the regions and activities by the individual schools themselves to EU funds.

## Denmark

### Sources of information

- Trade unions: LO (Danish Confederation of Trade Unions), FTF (Salaried Employees' and Civil Servants' Confederation), AC (Danish Confederation of Professional Associations), ETUC members; and Ledernes Hovedorganisation (The Danish Association of Managers and Executives) member of CEC
- Employers: DA (Confederation of Danish employers), member of UNICE; KL (Local government Denmark), Amtsrådsforeningen (Committee of Danish Regions), and Personalestyrelsen (State Employer's Authority), members of CEEP

### Actions taken at national level

Within the Danish model social partners jointly develop solutions to new challenges in education and training. Together with public authorities at national level these challenges are also notably addressed within the Council for Vocational Education and Training and the Council for Vocational Adult Education and Training.

#### **1) New collective agreement on the private sector labour market 2004**

In March 2004, collective bargaining in Denmark's main private sector bargaining area was concluded when the central organisations, the Danish Confederation of Trade Unions (LO) and the Confederation of Danish Employers (DA), signed a three-year overall compromise settlement drawn up by the Public Conciliation Service, which largely follows the lines of an agreement reached in the industry sector in February. In the agreement there is a special commitment to discussing issues related to Globalisation and especially Lifelong Learning issues.

The agreement states that: "Globalisation necessitates an adaptation of companies' competitiveness, amongst other things by means of a strengthening of the flexibility as well as the adaptability of the labour market and workers' skills. LO and DA emphasise a strengthening of the international competitiveness of Danish companies and want to contribute to supporting a stable labour market through the continuous development of an efficient system of cooperation and bargaining which is supported by a national vocational training system for the labour market which is adapted to the new requirements arising through globalisation."

#### **2) Tripartite committee on continuing vocational training**

In autumn 2004, the Danish government and social partners set up a committee which, over the next 12 months, will undertake a thorough review of current provision in the field of adult and continuing vocational training (CVT). In August, the Prime Minister invited the social partners to talks about how to upgrade the competences of Danish workers in order to deal with the effects of globalisation. The message of the Prime Minister was that, if Denmark is to continue to be one of the wealthiest countries in the world and at the same time secure a relatively even distribution of incomes, an important prerequisite will be a high level of knowledge

and competences throughout the entire labour force and a flexible labour market. All social partners responsible for this report participated in this committee.

## **Actions taken at sectoral level**

Together with public authorities, challenges are met at sectoral level within a large number of bodies and councils that have been established to take care of different parts of education and training. As social partners have worked together in these bipartite or tripartite settings at sectoral level for years, new challenges are easily identified and the social partners jointly develop solutions to new challenges in education and training.

### **1) Private sector**

- Competence development in productivity

Social partners within the "Production and Service sector" have throughout 2004 in particular focused on training offers to qualify workers to support competitiveness in production. The LEAN philosophy is at the heart of competence-development for unskilled and skilled workers. Other sectors and groups of workers have also started to apply the LEAN philosophy in order to strengthen competitiveness in the global economy. The basic concept of LEAN concentrates on no-mistakes production, waste, efficiency in adaptability and day-to-day improvements.

- A new flexible training system

Social partners within the "Electricity and Plumbing sector" have agreed to develop a new coherent system for training after completion of upper secondary vocational education and training. The principle is to be able to move from basic competences to specialised competences within a given subject, e.g. from basic competence in automation to special knowledge in programmable motors. The system has been structured to allow for flexibility for the workforce and for companies in order to coordinate training activities with the strategic development of companies. Social partners agree that time spent on unnecessary subjects should be avoided.

### **2) State sector**

The state sector personnel and management policy was published in 2003<sup>2</sup> with staff members' competences as an essential perspective. The effort to embrace change and assist continued development at the individual workplaces has been made, and a number of initiatives have been launched as well in an action plan to be executed throughout 2004 and 2005<sup>3</sup>.

The social partners consider integrating competence development into daily work-life to be a very important task and a joint responsibility.

An evaluation has been made of the "competence package" which was agreed upon during collective bargaining in 2002. The evaluation consists of a number of different inquiries. It highlights that in general the development of staff members'

<sup>2</sup> The personnel and management policy is available in English on the website [www.perst.dk](http://www.perst.dk).

<sup>3</sup> The action plan is available in English on the website [www.perst.dk](http://www.perst.dk).

competences is carried through. Moreover, the objectives of developing staff members' competences at individual workplaces have undergone profound progress. The evaluation shows that several individual workplaces have strengthened their strategic and systematic competence development, and employee development interviews are carried out in almost every workplace in the state, including written personal development goals.

### **3) Local and regional public sector**

In the overall collective agreement between management and labour made in 2002 for a three-year period the social partners agree to an arrangement on the development of competence (annex 5.2 official mediator proposal of 31 March 2002).

The agreement stipulates that the task for development of competence is to commit management and labour to give high priority to an increase in competence development.

It further demands that the necessary steps are taken vis-à-vis all workers to secure development of competences. An individual task for potentiality has to be developed for each worker. The obligations are mutual for both management and workers.

The social partners at the local level have asked an independent consultant (OPUS) to evaluate the agreement. The independent consultant has stated that a great deal of competence development takes place in the local public labour market. The consultant focused on seeing how task-setting for potentiality of competence has developed.

The task-setting for potentiality of competence is widely used in the local public labour market. Normally they are not very concrete - but elaborate on how to develop. When the development plans are very concrete they are in close connection with ongoing tasks. Normally there is openness connected to occupational development of competence. However, modesty is applied when the tasks relate to lack of cooperation.

Generally speaking the local labour market does not use the development plans in a strategic way - except in childcare facility institutions. Here there is a close relationship between the overall task for the institution and the individual task for each worker.

#### **Actions taken at company level**

At company level the Danish model has a long tradition of cooperating to find solutions to competence development and this is therefore often a basis for close cooperation with local or regional educational institutions.

## **Good practice examples**

- **The Danish Centre for Development of Human Resources and Quality Management**

The Danish Centre for Development of Human Resources and Quality Management (SCKK) runs a working network concerned with aspects relevant for improving the quality of employee development interviews. Participants in the network are individual state-run workplaces. The network meets regularly to share knowledge and cooperate on themes such as: strategic competence development, how to discover competence needs, developing dialogue methods for interviews, etc.

The Social Partners have carried out a joint project regarding the development of competence of commercial and clerical employees. The project focuses on experiences of good practice in a number of individual workplaces. The outcome is the communication of accounts and stories to give inspiration and knowledge about possible methods and objectives at the individual workplace. The subjects addressed include mentoring, neighbour training, establishment of networks, and mobility.

A programme for newly appointed managers is initiated in order to professionalise management at state level. An intensive training programme addresses personal leadership, personnel management, and teamwork in the management group as the first steps towards approaching lifelong learning at a managerial level.

Motivation and maintenance of staff in different age groups is considered an issue of great interest. There is general acknowledgement that the labour market situation calls attention to utilisation of the competences of staff members with several years of experience at state sector workplaces. Recently, SCKK hosted a very popular conference, which dealt with experience of policies regarding senior staff members.

- **Enhancing intercultural competences among health care staff and home help**

Health care staff in hospitals and personal care help in older citizens' homes have to accommodate the needs of the growing group of citizens of non-Danish origin. In order to create an efficient tool for employees to perform this task, a "Intercultural competences" course has been developed. It focuses on knowledge and understanding of different ethical and cultural values, taking into account different social norms concerning food and a person's body. The course is offered nationwide at the 14 Social and Health Education Colleges, and it is hoped that it will enhance the process of integration of citizens of non-Danish origin.

## Estonia

### Sources of information<sup>4</sup>

- Employers: ETTK (Estonian Employers' Confederation), Member of UNICE
- Employees: EAKL (Confederation of Estonian Trade Unions), member of ETUC.

In Estonia there are a number of institutions and organisations dealing with and promoting adult education and lifelong learning: Ministry of Education and Research includes the Vocational and Adult Education Department, which aims at planning and applying the principles and objectives of the national education policy with respect to vocational and adult education. The Foundation for Lifelong Learning Development Innove continues the activities of the foundation Vocational Education and Training Reform in Estonia (FVETRE) as from 2004. The Association of Estonian Adult Educators (AEAE) ANDRAS, an Estonian non-governmental organisation, which brings together the representatives of different branches of adult education and aims at increasing the competence of its members in the field of andragogics. The Chamber of Commerce is continuously active in contributing to the development of educational policy in terms of decisions that influence vocational education and the qualifications of workers. In addition there are 311 companies (total of 66,355), 28 sole proprietors (total of 21,682) and 86 non-profit associations and foundations (total on 20,546) registered in the Centre of Registers, which deal with Adult and other education n.e.c. (EMTAK 8042).

Since more recent surveys are unavailable, we will have to rely on data dating from 2001. A survey conducted by research company Saar & Poll in 2001 finds that 13% of people 15-74 years of age participated in various forms of study (evening courses, distance learning, external study, in-service training or retraining courses) in 2001. The survey did not include informal education. The most active group was people 20-29 years of age, who preferred such topics as entrepreneurship, business training, management, while older people opted more for industry, energy and construction. The main reasons for undertaking studies mentioned include self-development, an increase of professional qualifications, an increase of competences, referral by the workplace and the desire to be competitive.

ETTK has not continuously been very actively involved in actions for the lifelong development of competences and qualifications but, since education and learning is closely linked to industrial relations, ETTK has acknowledged its important role in these activities. In 2004 the main topics for members were social dialogue, structural funds, competitiveness, fiscal and tax policies, lobbying, strike legislation, EU labour acts, practical and effective using of EU legislation databases, safety and health at work, collective bargaining etc. ETTK participated in the UNICE BOSMIP project. In Estonia the Ministry of Economic Affairs and Communications initiated a project, that ran from December 2003 until October 2004, and which aimed at strengthening cooperation between on the one hand the ministries of the Estonian government, and on the other hand Estonian business organisations and labour

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<sup>4</sup> Resources also used: Ministry of Education and Research, Ministry of Economic Affairs and Communications, Foundation for Lifelong Learning Development Innove, Estonian Chamber of Commerce

unions. The project was funded by the Danish Government through the National Agency for Enterprise and Housing. In order to achieve its overall goal, the project will develop guidelines and administrative procedures for securing a framework for strengthened cooperation. At the same time the project developed and implemented training courses for both civil servants and experts from business and trade associations, having around 100 participants in the seminar and a series of training courses.

EAKL has not been very actively involved in actions for development of lifelong learning, but since education and learning is closely linked to industrial relations EAKL has acknowledged its important role in these activities.

EAKL participated in preparing the National Action Plan (national employment strategy) by giving our comments and proposals for amendments of the NAP. EAKL has been asked to provide the funding for work-related training and retraining by the state, giving the opportunity for this kind of training to be received by at least one third of workers. We consider that the state is trying to limit its responsibility for investment in human capital, developing only vocational education institutions; there are no real measures taken to set up financial mechanism to support LLL for the workforce.

Ever since Estonia regained its independence in 1991, numerous essential changes have taken place also in the field of adult education. In 2002-2003 the main emphasis was on examining the material on lifelong learning from the European Council and finding occasions for adapting them to the local conditions.

In 2001, the Minister of Education formed an expert work group for the purpose of development of the Estonian lifelong learning strategy. Employees representing various education sectors and levels, large and small enterprises and the public sector as well as various fields of activity were appointed as members of the work group. In 2002 the document was sent to over 40 organisations for comments and, based on their feedback, adjustment of the wording of the strategy was commenced in the same year. [*Lifelong learning strategy (2002 draft)*]

The Estonian national development plan for introduction of the Structural Funds of the European Union – a single programme document for 2003-2006, approved by the Government of the Republic and entered into force on 15 May 2003. Programme complement. In connection with integration into the European Union, the Structural Funds of the EU from to which one can apply for funds for promoting various fields will open to the Estonian state. The activities of the European Social Fund concentrate on the development of employment, increasing the qualifications of employees and creation of new jobs. The European Social Fund provides funds for promotion of adult education as well. The structural funds finance the projects as non-returnable aid, but in order to use the funds of the European Union for financing a project, the project must be self-financed to the extent of 25%. The Ministry of Finance led the preparations of the national development plan and officials of various ministries participated in the process as well.

The experts formulated recommendations with respect to the national adult education priorities, which shall be enforced as of 2004. The national adult education priorities are adopted by the Government of the Republic and the draft State Budget Act allocates the means for realisation of the priorities. [National adult

education priorities for 2003-2004]. The Ministry of Education and Research has also set up a document "Knowledge-based Estonia. Estonian Strategy for Research and Development 2002–2006"

In 2004 the Estonian Government approved the national priorities of adult education for 2004-2006. The priorities support implementation of the principles of lifelong learning and the Ministry of Education and Research, its partners and various parties rely on them upon organisation of their activities. The national priorities were approved by the Adult Education Council, in which ETTK has a representative.

The national priorities of adult education for 2004-2006 are as follows:

- 1) Creation of better opportunities for adults for accessing lifelong learning (incl. formal education) and giving an opportunity to return to the education system for those who have given up their studies;
- 2) Development of an adult counselling system, including enabling career counselling and development of an education opportunities information system aimed at adults;
- 3) Development of a system for taking previous study and work experience into account;
- 4) Development of the adult education funding model, incl. motivating companies through the tax system to invest in the training of their employees;
- 5) Ensuring the quality of adult education, including professional training.

Several undertakings were started in 2003 as a result of which the goals of the training of students in business should become clearer for companies, and also a system of support for training supervisors should be executed. The development of a qualification system for workers in 2003 can be described as positive and productive. With the lead of the Kutsekoda (Chamber of Vocation) in 2003, 126 profession standards were certified (34 new processes) and 859 professional certificates were issued. In total 365 profession standards have been developed. According to an overview compiled in September it can be claimed that almost all of the curricula of the higher vocational and higher professional education system have been compiled on the basis of these standards.

EAKL's 18 member organisations are involved in professional councils which are institutions of the Estonian Qualification Authority (trademark - Kutsekoda). Trade unions have been discussing lifelong learning issues in their meetings and called for these issues to be included in collective agreements and social plans (concluded for collective redundancies in big enterprises) – mostly in connection with employees' opportunities to gain new qualification, needed in the company (or region).

According to the state Statistical Office 63% of enterprises have carried out training, 12% have a training budget, 3% of enterprises have an internal training centre. An average of 28% of the employees participated in training courses. (last updated in September 2002)

## **Good practice examples**

- **National level: VII Adult Learners Week. 11.-17. October 2004**

Adult Learners Week has become one of Estonian wide traditional events, which popularises adult education and learning possibilities. Preparations for the Adult Learners week take year-long activities and have managed to achieve continuity. AEAE Andras and Ministry of Education and Science developed the plan of action for the Adult Learners Week. Same plan of action was the basis of the work for the national support group and for the regional co-ordinators of adult Learners Week. Consultative group for the Adult Learners Week was initiated in order to achieve better quality of the event and to involve wider target groups.

Main events of the Adult Learners Week: Opening of the Adult Educators Week; E-learning Day; Conference "The Role of Adult Gymnasiums in Estonian Education System"; VII Adult Education Forum "Career - a way or a ladder?"  
More info available <http://www.andras.ee/?op=EN>

- **Company level: Annual Awards for Best HR Projects**

Estonian Association for Personnel Development PARE together with the Chamber of Commerce, EBS Executive Training Centre and CVO Group has organised a competition and awarded Best HR Projects in Estonia since 2001. The goals of the competition are as follows: to have more value placed on HR work; to appreciate the work of the best professionals in the field and to highlight the contribution that efficient personnel work makes to companies' success.

In 2004 the Best HR Project Award 2003 went to Sampo Bank's internal mentor project. The best projects of 2004 will be announced in April 2005.

There is also an award for best HR student - Best Potential in HR Management. The target group of the competition are students, their diplomas and masterpieces in the field of HR management.

## Finland

### Sources of information

- Trade unions: SAK (Central organisation of finish trade unions), STTK (Confederation of Salaried Employees) and AKAVA (Confederation of Unions for Academic Professionals), members of ETUC
- Employers: TT (Confederation of Finnish Industry and Employers) and PT (Employers' Confederation of Service Industries in Finland), members of UNICE; VTML (State Employer's Office ) and KT (Commission for Local Authority Employers) and The Commission of Church Employers of Finnish Evangelical Lutheran Church, members of CEEP

### Introduction

In Finland public authorities and social partners have worked together in close co-operation in an effective way for a long time. Most of the working groups of committees preparing new legislation or systems are composed of social partner representatives. All four priorities identified in the "Framework of actions" are dealt with in these working groups and in this co-operation.

In the last three so-called "national income agreements" covering around 90 % of wage earners which the social partners have concluded in 2000, 2002 and in 2004, there has been a special section on education and training. The social partners had proposed that the Government set up a high-level tripartite Council for Knowledge, Skills and Competencies, effective from November 2004.

The national income agreement concluded very recently (15.12.2004) for the period 2005 – September 2007 contains a specific reference to the Framework of Actions with the aim of making it clear that it has been relevant to the joint measures taken by the social partners.

### Actions taken at national level

- **to identify and anticipate competences and qualifications needs**

The social partners' working group produced a position paper on the education and training challenges faced by adults. Globalisation, rapid technological development, demographic development and social and professional expectations of people are key elements influencing these challenges. The working group also dealt with concrete matters in the field of apprenticeships for in-company training and also for the improvement and development of the competence-based qualification system, which recognises informal and non-formal learning.

The Confederation of Finnish Industries is running the projects, "Services 2020" and "Education Intelligence" in order to find out the future needs of knowledge, skills and competencies in companies. These projects have representatives from all stakeholders because they are open projects.

The purpose of the national Veto Programme is to maintain and promote the attractiveness of work and working life. Its objective is to have young people start their careers earlier than they do now and to encourage older workers to stay longer in the workforce.

- **to recognise and validate competences and qualifications**

'Noste' is a programme implemented between 2003 and 2007 to raise the level of education and training among the adult population in Finland. The education and training offered within the scope of the Noste Programme is intended for working adults aged between 30 and 59 who have no post-compulsory school qualifications. The aim is that the participants achieve upper secondary level vocational qualifications or improve their skills and competencies in order to have better employability in the case of structural changes. The aim of the trade organisations is to train 800 people to act as advocates for the Noste Programme in workplaces.

The working life development programme "Tykes" works with the active involvement of social partners and supports projects related to workplace development. The projects promote work efficiency but also the quality of working life. Besides supporting the development projects, the programme aims to strengthen and disseminate competence and development.

- **to inform, support and provide guidance**

The social partners have set up a working group to deal with the information and guidance systems. It came up with the concrete proposal that information for the young people should be given earlier than it is now. It found out that there is a need for special guidance and information for older workers and they need special support for their studies. It also stated the need to raise the quality of guidance and have some kind of quality assurance.

- **to mobilise resources**

The social partners agreed to raise by approximately 100 euros the grant given by the Educational fund to the persons who have undertaken competence-based qualifications. Some age limits of this grant were also changed.

The social partners asked the Government to put more resources in the State budget for adult education and training. Specifically the social partners wanted the Government to raise certain quotas in the competence-based qualifications system. In the vocational training for young people there will be a new system in which a young person shows in a real working situation the competencies he/she has acquired. This requires particular measures and resources and the social partners asked the government to give the necessary resources for the new system.

In Finland there is an organisation preparing the test patterns for the competence-based qualifications and the social partners asked the government to set enough resources aside in order to secure the quality of the whole system.

The social partners also requested that the Government put aside enough resources for Higher Education in order to develop its capacity for high quality education and

training. There is a special program for young people at risk of exclusion, and the social partners asked the government to give enough resources for this programme. The social partners also asked the government to start to clarify how it would be possible to use the individual retirement insurance for the training purposes.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

The Association of Finnish Local and Regional Authorities has launched a project under the heading 'Local government know-how 2012', which aims to construct a model that will help local and regional authorities foresee future needs for change and meet the demands for increased competence in the future. The project will examine what expertise they need to achieve their vision and goals; how this expertise can be acquired and how it will be managed, used and developed.

The State Employer's Office conducted a survey among all government agencies to find out how they see that their competences and qualifications needs will develop by 2010 and by 2020. This information benefits the agencies as they make plans to maintain their core competence and to transfer competence from seniors to juniors.

- **to recognise and validate competences and qualifications**

The Commission for Local Authority Employers has initiated several networks which help local authorities learn from each other's experiences and to jointly create innovations related to services, organisation, personnel management and development. These networks place special emphasis on competence development.

The government sector has organised workshops and seminars for public employers, which deal with methods used to chart personnel skills and which give examples of how to create career paths for personnel to develop their professional proficiency and keep up their motivation.

- **to inform, support and provide guidance**

The Evangelical Lutheran Church of Finland has prepared an information booklet called "Learning and guidance in working life" which looks at learning at work and related guidance tasks from the viewpoint of work within the church. The development of management is also discussed in the booklet.

### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs**

"UPM-Kymmene Corporation, Kaukas mills in Lappeenranta" has, with its personnel, jointly created a training programme in order to improve well-being in work. The programme contains leadership training for supervisors, how to enlarge a job's description and how to solve problems. Approximately 60 % of the pulp mills personnel have participated in the programme.

### **Examples of good practice**

The response of the City of Espoo to early retirement is age management. The senior model is designed to serve as an ideal model for age management. The goal is that as many ageing people as possible would be motivated and fit to work efficiently until retirement. The model gives an opportunity for career planning, education and training or new tasks. A central part of the senior model is mentoring.

## France

Sources of information

- Trade unions: CFDT/UNSA (French democratic confederation of work), CGT (General confederation of work), FO (Workers' force), CFTC (Confederation of Christian trade unions), members of ETUC
- Employers: MEDEF (Federation of enterprises of France), member of UNICE; CEEP French section; CGPME (confederation of SMEs) and UPA (Union of craft), members of UEAPME

### Introduction

2004 was characterised above all by application of the national cross-sectoral agreement dated 5 December 2003 on employee access to lifelong learning on the basis of the law dated 4 May 2004, sectoral agreements and enhanced concertation at company level.

### Actions taken at national level

- **to identify and anticipate competence and qualification needs**

Further to the national cross-sectoral agreement dated 5 December 2003 on employee access to lifelong learning, the social partners negotiated two additional provisions relating respectively to:

- work assessment interview, skills scoreboard and training passport
- validation of experience-based skills

These texts now await signature.

CFDT, in partnership with UNSA, carried out a reflection exercise on trade unions taking charge of skills development.

This joint work concluded with a triple requirement: development of social dialogue, creation of new guarantees for the employee of greater recognition and greater protection in his or her professional life, and modification of trade union practices in the company.

- **to recognise and validate competences and qualifications**

In 2004, the social partners participated in creation, on the initiative of the state, of a *Répertoire National de la Certification Professionnelle* (RNCP – national repertory of vocational certificates).

The purpose of this tool is to catalogue, in a single repertory, all existing certificates in order to be able to establish bridges and equivalences between them with a view to promoting employee mobility and preparing career plans.

This RNCP, which covers all levels of competences, including higher, will be operational from the start of 2005.

- **to inform, support and provide guidance**

In order to promote dissemination of the content of the national cross-sectoral agreement, the social partners participated on several occasions in bilateral presentations of the 5 December 2003 agreement and 4 May 2004 law on lifelong learning. In addition, each of the employer and trade-union organisations developed information for its own members.

In order to relay this information, the social parties decided to finance for one year, through a national bilateral coordination body, four hundred agents recruited by OPCAs to pass on information and provide guidance to companies and staff representation bodies on the new provisions.

- **to mobilise resources**

In application of the 5 December 2003 national cross-sectoral agreement, in 2004 companies perceptibly increased the minimum amount of their investment in training, which grew for companies employing fewer than ten employees from 0.25 to 0.40% of their total payroll costs, and for companies with ten or more employees from 1.5 to 1.6% of their total payroll costs. It should be recalled that the average training expenditure of companies with ten or more employees is currently 3.2% of their total payroll costs, with contrasting rates and developments depending on company size and area of activity.

The amounts deployed by companies with more than employees for financing individual training leave increased on average from 0.17 to 0.20% of their total payroll costs.

### **Actions taken at sectoral level**

2004 saw intense negotiations at sectoral level to allow definition of priorities, in terms of target publics and type of training, for the training plan, individual right to training, employability-enhancement contract for young people and jobseekers joining companies and period for employability enhancement designed to promote improvement of the qualifications of certain employees.

In 2004, 36 such sectoral agreements covering more than 80% of employees were concluded.

- **to identify and anticipate competence and qualification needs**

Each sector put in place a forward-looking observatory for skills and qualifications, whose purpose is to flank companies in the sector in question when defining their training policy and employees when preparing their career-related plans.

- **to recognise and validate competences and qualifications**

Sectors created vocational qualification certificates which constitute one of the forms for certification of acquired skills and competences, alongside academic and vocational diplomas.

- **to inform, support and provide guidance**

OPCAs at sectoral level developed information for companies on the new orientations for continuing vocational training and on the priorities defined through each sectoral agreement.

### **Actions taken at company level**

- **to identify and anticipate competence and qualification needs**

When staff representation bodies were consulted about the training plan for 2005, company managers for the first time applied the new provisions flowing on from the 5 December 2003 national cross-sectoral agreement.

In this way, three categories of training action have been defined:

- work station adaptation actions
- training actions linked to evolution in jobs
- actions designed to develop skills

With the employee's agreement, some categories of action can be implemented partially or totally outside working hours and, accordingly, give rise to payment by the company of a training grant, commitments by the company and recognition of the efforts made by the employee.

- **to recognise and validate competences and qualifications**

Many companies have facilitated their employees' access to validation of experience-based skills, either through an individual initiative or on a collective basis.

### **Examples of good practice**

At sectoral level, all sectoral agreements concluded in application of the 5 December 2003 national cross-sectoral agreement are examples of good practice and concertation at sectoral level.

At company level, some agreements are extensions of sectoral agreements, e.g. those concluded by the AXA group or VEOLIA-Environnement.

La Poste carried out a sociological study on traditional postal skills. Among other things, this study identified new or "undervalued" aspects of these skills.

The project and its main findings were the subject of presentations to trade-union organisations. The results of the work will be incorporated in assessment tools and will also serve to build career plans.

SNCF, Société Nationale de Chemins de Fer Français, is fully committed to the priorities of the framework of actions for lifelong learning. Actions taken relate notably to creation of a skills institute, internal initiatives for validation of experience-based skills, and a mechanism for vocational advice and guidance.

## Germany

### Sources of information

- Employers: BDA (Confederation of German employers' federations), member of UNICE; ZDH (Central federation of German craft), member of UEAPME
- Trade unions: DGB (Confederation of German Trade Unions), member of ETUC

### Introduction

In 2004 the focus was on the initiation of steps to further improve general academic education through activities of the German federal government and its states (including the expansion of pre-school advancement, full-time schools, and the further development of educational standards). The year was also marked by activities dedicated to the improvement of vocational education and the generation of an adequate number of educational opportunities for young people.

In May 2004 the Federal Government of Germany put forward a bill to amend the Vocational Training Act. Employers, employees and the government had a collective hand in formulating the language of the bill, through statements or – as the federation of German Trade Union (DGB) had – through a bill of its own. The present status of the legislation is that it will become law in the first half of 2005. Employers, employees and the government are collectively advocating for the further development of the quality assurance and interpenetration of different forms of education, as well as for better integration of German vocational education and training in an international context.

The year 2004 also involved continuation of the process of modernisation, involving the development of new and modernisation of existing occupations. Through this process, with effect from 1 August 2004, some five new vocational designations were created and twenty-five existing designations brought up to date.

The central theme in vocational education for 2004 was the keen competitive situation of the educational market itself. In the first half of 2004, debate around this issue was driven by the plans of the federal government for the introduction of apprenticeship places for school-leavers included within the Vocational Education Assurance Act.

On 16 June 2004 the federal government and central associations of the German economy completed the National Pact on Vocational Training and Young Apprentice Development 'Nationaler Pakt für Ausbildung und Fachkräftenachwuchs in Deutschland'(see below).

Continuing education stands next to general academic education and vocational education and training as the third pillar of our educational system. Along with these, the demands of continuing vocational education through federal work agencies play an important role, showing that inadequate successes in worker reintegration, efficiency and goal direction must indeed be further improved.

## **Actions taken at national level**

- **“Nationaler Pakt für Ausbildung und Fachkräftenachwuchs in Deutschland” (National Compact on Vocational Training and young skilled personnel in Germany)**

The National Pact on Vocational Training and Young Apprentice Development, signed by the Federal Government and the main organisations representing German business (BDA, BDI, DIHK and ZDH) on 16 June 2004 for three years, reflects how business takes responsibility for training young people. Such voluntary commitment and cooperation of relevant actors works much better than mandatory instruments such as training levies and improves the vocational training situation. The federal compact is accompanied by regional pacts, which breathe life into the federal pact.

The common goal of the federal government and business organisations is, within the compact's framework and in close cooperation with the “Länder” (German federal states), to offer every capable and willing young person a training opportunity. Young people with limited opportunities enter into special pre-training measures in order to be integrated into regular vocational training (signing an apprenticeship contract with a company).

Key measures agreed upon in the compact are:

- To recruit an annual average of 30.000 new (in-company) apprenticeship places
- To provide 25,000 traineeship places (for pre-training measures) per year for young people with limited prospect of being integrated in regular vocational training. This will be supported by a tax-financed subsidy for young people with limited prospect of being integrated in regular vocational training systems.
- Joint “Nachvermittlungsaktionen” (action for late apprenticeship placement) by chambers of commerce, chambers of skilled crafts and the local employment agency.
- To increase the number of apprenticeship places by 20 percent in the federal government
- Appeal to the social partners for establishing incentives for vocational training and reducing hindrances in collective agreements.

- **„Ausbildungsinitiative 2004“ (Training Initiative 2004):**

As in 2003, employers' organisations announced in 2004 that they will make every effort to offer as many apprenticeship places as possible. Employer organisations, especially at regional level, call upon companies to invest in vocational training, to support and organise training cooperation). They also organise advertising campaigns to recruit young people for their apprenticeship places and support schools for a better vocational guidance. Employer organisations invest a total of € 100 million in all these initiatives every year – in addition to the € 28 billion that companies invest in the initial vocation training of their apprentices.

- **Federation of German Trade Unions (DGB) LeA Project - Living and Working**

Under the title "Educational Coaching," the LeA project of the Federation of German Trade Unions (DGB) is aimed at offering a course in which 'coaches' will be certified to assist employees in various ways.

2005 will be dedicated to the realisation of this continuing education certification for the activity of educational coaching. This year's work will serve as a model experiment for the agenda of the project in future years. The instruction being offered is constructed in a modular and proactive way. It will be offered in the form of in-service training consisting of seven modules.

In addition, during the first half of 2005, a consulting and monitoring programme for workers and staff councils will be developed. This supplemental programme is meant to provide these workers and staff councils the necessary competences and methods for the participants to raise their levels of preparation for continuing education. It is also meant to strengthen the themes of lifelong learning, the early determination of qualifications, and the work-life balance in their daily activities.

Through the initiative and support of qualification and organisational development processes, employer representatives are able to provide an important contribution to generating and developing the employability of their co-workers and at the same time to strengthen the competitiveness of their business.

LeA is being promoted and supported within the framework of the Early Recognition of Qualification Needs Initiative started by the German Federal Ministry of Education and Research. The project is being conducted in cooperation with the Berufsbildungswerk (bfw) and the Fraunhofer Institute for Industrial Organisation. [www.dgb-lea.de](http://www.dgb-lea.de)

#### **Actions taken at sectoral level**

- **The construction of union networks for workers and staff councils on the subject of vocational education/continuing education – The KomNetz Project**

The United Service Trades Union (ver.di), the Industrial Trades Union of Metal Workers (IG Metall) and the Industrial Trades Union of Miners, Chemical, and Energy Workers (IG BCE) are the respective partners in the KomNetz Project. In this project, the unions advise and support workers councils through the structuring of lifelong learning in business, a task that in Germany, according to the Workers Council Constitution Act, is meant to be a cooperative effort of worker management. With this, the project and the networks initiated thereby should make it possible for workers and staff councils to awaken and demand the interest of employers with regard to their qualifications, as well as their paths toward professional development and promotion. In addition, the knowledge management of workers and staff councils on the subject of vocational education is meant to be supported, focusing on vocational education in the sense of deepening, expansion, conversion, exchange and generation.

KomNetz will be implemented under the auspices of the research programme „Cultures of Learning in the Development of Competency“ of the Federal Ministry for Education and Research (BMBF). The project will be aided by the Federal Ministry for Education and Research as well as the Federal Ministry for Labour and Social Affairs by means of the European Social Fund. The programme agency is the „Work Community of Business Continuing Education Research, e.V. (ABWF). KomNetz was started up in January 2001.

### **Actions taken at company level**

- **BASF Ausbildungsverbund (Training Cooperation):**

In 2003 BASF AG initiated cooperation in training with other companies. With this initiative, BASF contributes to securing and enlarging the supply of apprenticeship places in the region. 400 places were created in 2004.

- **BayME/VBM-Lehrstelleninitiative 2003/2004 (Training Initiative 2003/2004):**

In 2003 and 2004 the Bavarian metal and electrical industry sponsors/supported 1,100 additional apprenticeship places in member companies and in 2004 50 more places for the occupation „Maschinen- und Anlagenführer“, which offers special opportunities for young people with limited prospects.

Companies offer traineeship places to integrate young people with limited prospects in the vocational training system – such as the Bahn AG with the programme „Chance plus!“. Here, the Bahn AG offers training to 120 young persons who are not yet ready for an apprenticeship. Bahn AG supports them e.g. with additional lessons in German, maths, etc., and projects to strengthen their social skills.

## Greece

### Sources of information

- Trade Unions: GSEE (General confederation of Greek trade unions), member of ETUC
- Employers: SEV (Federation of Greek Industries), member of UNICE

### Actions taken at national level

SEV conducted research through questionnaires to industries under the title: "Jobs in demand – Anticipation of needs of enterprises for 2005-2007". The main goal of this research study was to disseminate awareness of the particular needs of industries in professional skills and core competences of their personnel for 2005 -2007. Other goals included:

- influencing the organising and planning of vocational training according to these needs as well as the reform of the educational system, especially higher education, towards the demands of the labour market;
- creating new and better jobs.

The results of the research showed that the educational system cannot deliver high-quality personnel with competences and qualifications that meet the demands of the labour market.

The research has been widely publicised and will be updated in 2007.

Meetings between the social partners concerning ways to improve efficiency in the operation of their Joint Account of own funds, LAEK, for the promotion of vocational training that started in 2003 have moved forward into action. A working group that was set up by the social partners is currently working on a strategic plan for making more efficient use of the available and incoming resources for training and for promoting new lifelong learning (LLL) programmes that will respond to the real needs of the labour market as well as its labour force.

The social partners have been very active in promoting the activation of the "National System of Education and Training linked to Employment" (ESSEEKA) which was adopted in October 2003 by the Greek Parliament but its operation has not started yet. The role of the social partners was very decisive in formulating provisions of the law. ESSEEKA aims to promote lifelong learning, the development of competences and qualifications and their validation.

The Labour Institute of GSEE has conducted an evaluation study on the effects of Active Labour Market Policies in Greece. The study will be published next spring.

## Hungary

### Sources of information

- Employers: MGYOSZ (Hungarian Confederation of Industrialists), member of UNICE; KISOSZ (National federation of Traders and Caterers), member of UEAPME member; AFEOSZ (National federation of Consumer Cooperatives)
- Trade unions: MSZOSZ National Confederation of Hungarian Trade Unions, member of ETUC

### Actions taken at national level

Hungary joined the EU in 2004. Following discussions with social partners, the National Development Project (hereafter NDP) and its implementation was launched in 2005. 2004 was the year of creating strategies at every level of education and training. The strategies for public education, vocational training and higher education were even completed last year and the LLL strategy is currently under preparation. On the one hand 2005 is the first year when Hungary has access to the resources of Structural Funds to realise its projects; on the other hand Hungary has to meet the requirements of being an EU member. Numerous national as well as local programmes focused on familiarisation with and analysis of NDF, LLL, the EU education policy, new regulations and new measures (such as EUROPASS).

- **to identify and anticipate competences and qualifications needs**

With national and international funding, numerous development programmes have been launched aiming at the development of competences. Some examples can be mentioned: Vocational School Development Programme, programmes within the framework of NDP Operative Programme on Human Resources Development, a joint project of chambers of commerce and organisations representing economic interests serving the development of 16 trades. At all levels the preparations for shifting to an educational system, training courses and programmes based on competences have been made. At elementary level the goal is to develop key competences, career competences and social competences; briefly; competences which children can take advantage of later on the labour market.

At vocational schools, training courses comprise competence-based modules. A list of competences expected from young people entering the labour market is under preparation based on preliminary analyses of different trades. Vocational or professional requirements will be adjusted to these needs and expectations. To this end, representatives of employers' organisations and their experts are involved and consulted.

Those who apply for the registration of a new or altered qualification in the National Qualification Register (hereafter NQR) are responsible for elaborating the professional and exam requirements, establishing competence needs for that particular qualification and obtaining the approval and support of national economic chambers. The final decision is in the hand of the National Vocational Training

Council. Before taking its decision, the Council consults NQR committees made up of economic experts.

- **to recognise and validate competences and qualifications**

Within the framework of formal education the successful termination of training/courses is proved by a national certificate in the case of higher education, a degree certifies the end of a certain a level of education.

In non-formal education according to the Adult Education Law (has existed since 2001), a contract drafted between the training/course provider and the student participating in that particular training or course is that contains the requirements and the form of document certifying the pass of the final examination. Recently more and more internationally recognised degrees have been issued. For example: language courses, manager courses, ECDL, etc.

Regulated professions are validated and recognised according to EU rules. Mutual recognition of certain professions has been facilitated by the establishment of the Hungarian Equivalence Centre and the foundation of an institution for introducing EUROPASS.

In higher education the European Credit Transfer System is used in Hungary.

At middle level a certificate or at high level a degree of a certain profession can be obtained if the professional and examination requirements set by NQR are met. Conditions for obtaining a Master's certificate are prescribed by economic chambers.

NQR was drafted in 1993 according to the Vocational Training Law and is amended almost every year. Currently it contains 850 nationally recognised vocational training courses.

- **to inform, support and provide guidance**

The currently existing system of career counselling needs reforming in Hungary. Institutions providing career guidance are as follows: educational institutions, pedagogical institutes, institutions of the National Employment Service, jobcentres, non-governmental educational companies, non-profit organisations, chambers, interest representation organisations, institutions of the private sector.

According to the Adult Training Law for an adult training institution to be accredited, it must provide career counselling, pre-assessment testing and training counselling as services.

Informational Employment Counselling is a novelty in Hungary. Some websites on career orientation and counselling have been launched, thus students at school have access to online information on, latest trends, favoured jobs on the labours market, jobs abroad.

As a result of Leonardo project a manual was issued for SMEs on the results of an analysis conducted on training needs, forms of education and work and a module for training counsellors accordingly.

- **to mobilise resources**

LLL is financed from numerous resources: from the state budget, by local authorities, by state contributions, from direct financial resources, from national and international tenders, and private contributions.

Since the Adult Training Law entering into force in 2001 financial support has been made available for adult training from the state budget. The Hungarian state provides a normative financial contribution, set in the budget law, to nationally recognised adult training courses taking place at adult training institutions, registered in NQR, providing first general, language or professional qualification to adult or handicapped adult students.

Each taxpayer can annually benefit from a tax reduction (approx. € 220) from his annual tax for a training course in an accredited training institution. Accredited training courses, even if they are not registered in NQR are exempt from VAT. One third of a worker's contribution (1.5%) can be devoted to his own training. Labour Affairs Councils, made up of social partners, are entitled to take decisions concerning the financial framework available. From other contributions paid to the Labour Market Funds, training courses and the training development are financed for which tenders are announced. Two sources are distinguished in the Funds for financing training courses: one for professional training courses and their development, and another for adult training courses and their development. The Minister of Education takes the final decision according to the proposals of the Regional Development and Training Committees in which the social partners are also represented.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

In 2002 the Minister of Education set up a NQR Committee comprising 21 working groups, aimed at developing trades and professions. Since 2004 members to this Committee have been nominated mainly from the economic sector, from among social partners, from chambers, trade unions and employers' organisations. Their task is to analyse the existing structure and conditions of that particular trade or profession and anticipate the possible changes. In several cases representatives from employers' organisations delivered reports on the current trends and needs of a particular trade or profession.

In 2004 Sectoral Dialogue Committees were set up. Numerous Sectoral Committees deal also with professional trainings essential for workers to be competitive on the labour market. The Committee of the Construction Sector, for example came up with a report on the currently existing trades in the sector and the trades needed.

- **to recognise and validate competences and qualifications**

Each minister drafts the professional and examination requirements of the professional qualifications belonging to the sector for which he is responsible. Examinations are under his responsibility as well. Requirements need to be

approved by the Minister of Education. Qualifications, however recognised only if they are registered in NQR.

- **to inform, support and provide guidance**

Professional organisations keep their members informed via newsletters, their websites, e-mails, events.

Sectoral Dialogue Committees will open up new possibilities of information exchange within the sector.

- **to mobilise resources**

Interest representation organisations, professional organisations provide trainings for their members. These trainings are charge free depending on the tenders won for that training or using the company's own-funding. It makes it easier for SMEs to assemble tender dossiers since companies do not have to submit their tenders one by one.

### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs**

Depending on the size of company, there exist various practices to develop competences.

The most up-to date methods are used by multinational companies and medium-sized companies. The best way to attain the business targets of the company is to identify the skills, competences expected from a worker. In practice, qualifications, together with competences, can be arranged in one catalogue. Elements of these competences can be matched on the one hand, with workers thus creating individual profiles for workers, on the other hand with certain jobs thus creating job profiles.

Small and micro-sized enterprises contribute to the elaboration of professional/vocational and examination requirements of nationally recognised professional training courses of the sectors in which they are also interested.

- **to recognise and validate competences and qualifications**

Companies accept mainly, in less and less cases however, nationally recognised qualifications. The validation of qualifications and certificates of the candidates depends on the job they applied for and on the company.

In the case of a corporate internal training for one particular job, the company itself issues the certificate at the end of the course. If it is an external educational institution that organises the training but according to the company's demands, the institution issues the certificate testifying to fulfilment of requirements set by the training programme. This certificate is recognised, but by the company.

- **to mobilise resources**

Corporate internal training courses are financed from various resources: by the company if the training is initiated by the company, financing is a matter of agreement between employer and worker if it is the worker who initiates his participation in training. The company can contribute to the training either only financially or can provide working time reduction as well. If a scholarship contract is signed between the parties, the Labour Code determines the rights of the worker.

### **Good practice examples**

- Although it is not yet typical, professional associations take initiatives to register new trades or professions in NQR or alter the requirements of trades already registered there. For instance the National Association of Building Entrepreneurs initiates the registration of "dry construction" as a new trade. With new materials and technologies, the need for new competences and a large number of new nationally recognised trades and professions have and will come up.
- The Hungarian Refrigeration and Air Conditioning Association in cooperation with similar international associations has elaborated a study within the framework of a Leonardo Project on the European-level definition of a refrigerator assembler's profile and competences. This study provided help for NQR Machine Industry Working Group.
- A medicine manufacturing company elaborated and introduced an Educational Code with the aim to ensure equality for workers in the access to educational programmes and to promote and orient the training of workers according to the company's needs. The Code comprises the conditions of participation in education, the principles of financing, the organisation of training courses and the obligations of the worker in return for the training. They compiled a catalogue of training courses as well with the short description of the training courses available and financed by the company and the conditions of participation. The Department of Training provides counselling for workers to find the appropriate training and institution.

## Ireland

### Sources of information

- Trade unions: ICTU (Irish Congress of Trade Unions), member of ETUC
- Employers: IBEC (Irish Business and Employers Confederation), member of UNICE; FAS (training and employment authority), member of CEEP

### Introduction

There is universal agreement that investment in education and training has been one of the key contributors to Ireland's economic success of recent years. The challenge now facing Ireland is to build on this investment in education and to extend its reach to all groups in society. Public and private investment in education, together with a commitment to excellence at all stages of the learning process, is essential to achieving a competitive and socially inclusive society. The technological developments and societal changes present challenges and require a new range of skills to enable individuals to adapt, communicate, interact and participate more effectively.

### Actions taken at national level

The total budget for in company training is €43.47m. This excludes expenditure on apprenticeship which is €130 m in 2004. €24.45 m of the company training budget is spent by FAS the state training authority, with the next largest spends being undertaken by Skillnets at €4.67m and Failte Ireland which covers the tourism/hospitality sector. The remainder is spent by specialist agencies who operate either at a regional level or at a sectoral level in Agriculture and sea fishing.

FÁS, the Department of Education and Science, IBEC and ICTU have pursued a concerted approach in the allocation of ESF funds towards in company training. This involves steering resources towards new projects, and in some cases new providers.

Implementation of the Report on the Task Force on Life-long Learning, published in October 2002, continues to be a priority. The mandate of the National training advisory committee and the Expert Group on Future Skill needs has been reviewed, and the two organizations have been amalgamated into a single smaller committee with enhanced social partner involvement. This group is currently commencing a review on the spending on learning for those in work.

### Actions taken at sectoral level

FÁS, is in the process of reorienting its provision towards learning in the workplace. The details of this reorientation will be made known early in the New Year. Increased funds have been allocated to FÁS to improve workplace training in 2005. Individual unions within ICTU and individual trade associations and sectors within IBEC have been very active in the education and training area and in a number of

instances have established training networks through the Skillnets Initiative. This is an enterprise led initiative designed to promote learning in the workplace.

### **Actions taken at company level**

Training continues to command increasing attention and priority at company level. The IBEC 2004 Human Resources Management Survey indicates that the average spend on training, as a percentage of payroll is 3.15%, identical to the figure recorded in 2002. The issue raised in this report last year of training being concentrated at the higher level of educational attainment of the workforce has begun to be addressed, with low basic skills figuring prominently in the policy debate.

As part of a broader commitment to training and development, many companies provide financial sponsorship and support for various employee development and educational courses, leading to professional, academic and vocational qualifications. Almost all companies in IBEC Human Resources Management Survey provide such support to employees.

Trade unions for their part have developed an increased role in brokering and in some cases providing vocational training for their members. The existence of a single qualifications structure gives great potential for the linking pieces of certified learning towards an award

A competency Development Programme (CDP) was introduced by FÁS in January 2003 to replace the Training Support Scheme (TSS) and Construction Training Incentive Scheme (CTIS), which were terminated on 31st December 2002. The aim of the CDP is to raise the competency levels of targeted employees in particular occupations within specific sectors to ensure that the national stock of skills matches the national human resource requirements for continuous economic growth.

In 2003, FÁS continued to implement a pilot programme of management development for small firms (under 50 employees). The programme is operating in Dublin, South East and South West regions, and involves 30 companies.

### **Good practice example**

- **Skillnets**

Skillnets the training Networks Programme is currently running with the networks which were approved in 2003. During the year 2004, calls were issued for work on the return on investment arising from training and on the key issue of low basic skills.

- **Construction sector**

The Construction Industry Federation and the construction unions are jointly delivering a safety-training programme in conjunction with FÁS for all employees in the construction industry. Successful completion of this programme will be mandatory for all construction employees from June 2003.

- **New qualifications framework**

The 10 level national qualifications framework is now in place and all new higher education awards will be offered for all programmes commenced in autumn 2004. New awards are also under development in the field of further education and training. The framework is being developed by the National Qualifications Authority of Ireland and the two awarding bodies, FETAC (Further Education and Training Awards Council) and HETAC (Higher Education and Training Awards Council). A framework for the accreditation and certification of training and life-long learning is still being developed with proposals anticipated by late spring 2005. All the Social Partners are involved thereby ensuring that particular emphasis is placed on workplace training.

- **Actions towards the unemployed**

The Irish National Employment Action Plan (NEAP), adopted by the Government as its response to the European Employment Guidelines, includes a commitment to a more systematic engagement of the Employment Services with the unemployed. The core orientation of the Employability pillar in the EU Guideline, which is based on a preventative strategy, is focused on early and systematic intervention with unemployed people, re-integrating them into the labour market as quickly as possible, inter-alia, by providing them with the necessary skills to improve their employability.

The National Employment Action Plan was further extended to target those long-term unemployed not previously referred under the NEAP as they were outside the referral thresholds as the programme began. Under this measure all persons aged between 18-54, not previously referred under the NEAP and who are more than 6 months on the LR, are referred to FÁS for interview.

In 2004 approximately 61,000 clients will have been referred for interview, of whom, approx. 41,000 will have presented for interview and received a service.

Special Initiatives developed in response to NEAP

- **The Pathways Programme**

The Pathways Programme is a two-week group guidance programme for clients identified under the National Employment Action Plan (NEAP). The aim of the programme is to identify the most appropriate development pathway for each participant in order to assist them obtain and maintain employment. The programme is delivered on a group basis in order to encourage a dynamic in which clients can support and learn from each other.

The programme is designed to be a highly positive and motivating experience. It adopts a cognitive-behavioural approach to learning, which aims to change the attitudes and actions of participants towards employment. A pilot of the programme was launched in a number of locations towards the latter half of 2003.

We estimate that approximately 1,000 NEAP clients will have attended Pathways Programme by the end of 2004.

- **The High Support Process (HSP)**

FÁS introduced a new High Support Process (HSP) to assist NEAP clients who are experiencing personal barriers to employment. Multi-Agency teams are in place, comprising representatives of the Health Boards, Education, Probation and Welfare, etc to address non-vocational barriers, e.g. drug abuse, literacy/numeracy.

An external evaluation of the HSP commenced and will be completed by end of 2004.

- **Customised Training Fund**

The Customised Training Fund was established to give Employment Services Officers greater flexibility in responding to the identified training needs of specific caseload clients. The need for such flexibility was highlighted through the operation of the NEAP where the specific training needs of some NEAP clients could not be met by FÁS, or could not be met by FÁS, within a reasonable timeframe.

An evaluation of the Customised Training fund is due to take place at the start of 2005.

An evaluation of the NEAP preventive strategy has been commissioned by the Department of Enterprise Trade and Employment (DETE) in conjunction with FÁS and DSFA. The findings of this evaluation will greatly assist in the further development of the programme and also the development of appropriate and timely interventions/options for clients presenting under the NEAP.

# Italy

## Sources of information

- Trade unions: CGIL (General Italian confederation of work), CISL (Italian confederation of trade unions) and UIL (Italian union of work), members of ETUC
- Employers: Confindustria (Confederation of Italian Industries), member of UNICE; Confapi (Confederation of individual private SMEs), Confartigianato (General confederation of Italian crafts) and CNA (National Confederation of Handicraft and SMEs), members of UEAPME; Italian section of CEEP

## Introduction

The main elements that mark the context in which the framework of actions was applied in Italy in 2004 are:

- Following adoption by the Italian government of a law on the labour market and employment and of a law on education and vocational training systems, several decrees were adopted for implementation of the reforms. Social partners also concluded two agreements for the transition from the previous training and labour contracts to the immediate application of a new labour contract introduced by the labour market reform, so-called "contratto di inserimento".
- The Italian social partners are now discussing with the Italian institutions conclusion of the reform of the continuing vocational training system by passing the entire amount of 0.30% to the social partners and therefore to the cross-sectoral funds, that in 2005 will invest about € 300 million and will probably concern 300,000 workers.
- Confindustria and CGIL-CISL-UIL relaunched the bilateral cross-industry social dialogue on education and training with the first calls for proposals for the cross-sectoral funds Fondimpresa and Fondirigenti.
- An agreement for competitiveness and employability (signed by CGIL-CISL-UIL and Confindustria) entitled "Accordo per lo sviluppo, l'occupazione e la competitività" was concluded in mid-2003 and brought up to date in 2004. The pact addresses the areas of research and training, as well as the areas of infrastructures and disadvantaged territories.
- On 17 March 2004, craft confederations (Confartigianato, CNA, Casartigiani and CLAAI) and trade unions (CGIL, CISL and UIL) reached an agreement in order to reform the contractual model thus increasing value in skills at regional level. In particular, at national level, the new contractual model attributes a guarantee on normative and remuneration standards and, at territorial level, it assigns the task of distributing employment productivity, guaranteeing the protection of salary purchasing power and regulating the matters regarding professional training and labour market. All this is also possible thanks to the support of handicraft sector bilateral bodies.
- A cross-industry agreement on continuing training of SME managers was concluded on 10 June 2003 by the private industrial SME confederation Confapi with Federmanager.

## **Actions taken at national level**

Confindustria continued the initiative for monitoring of all the actions taken by its members on the priorities identified in the framework of actions, at both sectoral and territorial level.

Regarding the resources allocated to vocational training, signature of the framework of actions stimulated the identification of cross-industry funds for continuing training, release of which started in 2003. Further to the various bilateral agreements signed in the past, these funds will serve for realisation of training plans at various levels: sectoral, territorial or company.

Further to an agreement between Confindustria and trade union organisations, a fund known as "Fondimpresa" is now organised at central and partially at local level and has started to finance the first plans for promotion of continuing training for workers in 2004 and 2005.

Regarding continuing training for managers, Confindustria and Federmanager has organised a fund known as "Fondirigenti", within the existing Fondazione Taliercio.

Regarding craft industries, an agreement was also concluded on 6 June 2001 by national craft organisations and trade unions on a fund known as "Fondo Artigianato Formazione" (Handicraft Training Fund), designed to finance continuing training plans at all levels for retraining of workers.

During 2004 "Fondo Artigianato Formazione" (Handicraft Training Fund), cross-industry fund for continual training, set up by the entrepreneurial handicraft confederations (Confartigianato, CNA, Casartigiani and CLAAI) and the trade union confederations (CGIL, CISL and UIL), will be fully operative with the possibility of setting up the first vocational training actions for workers and for the numerous enterprises which are part of the fund.

These actions are aimed at satisfying wishes and needs for vocational training, re-qualification, adaptation and updating of workers' professional abilities.

The number of workers (13% of the total number of workers interested in the Funds) and enterprises (43.71% of the total number of interested enterprises in the Funds) who are part of the Handicraft Training Fund make it an important instrument in representation and support of vocational training needs of these workers and craft/micro/small enterprises, for whom it is strategic to invest in development, growth and adaptation of effective professionalism, especially in view of the complex challenges coming from market globalisation.

Up to now Fondo Artigianato Formazione (Handicraft Training Fund) has published two calls for the introduction of projects for continuing training. Projects concerning the first call, which closed on 30 November 2004, are being evaluated. Projects concerning the second call, which will close' on 31 January 2005, are not available yet.

"Fondo formazione PMI", created on 27 November 2002 further to a cross-industry agreement between Confapi and CGIL-CISL-UIL, and designed to finance promotion

of continuing training for SMEs with a dual concern to foster corporate competitiveness and to ensure worker employability, launched at local level a promotional campaign for the communication of the activities and services provided. The first national call for applications was launched on October 2004 to finance training plans and projects for SME workers. Three local seminars have been organised to present the call for applications to enterprises, trainers and social partners.

In June 2003 Confapi and Federmanager have also created a fund known as "Fondo Dirigenti PMI" designed to finance continuous training of SME managers that is now fully operational.

During 2003, four other funds for continuous training were created by the trade union confederations (CGIL, CISL and UIL) and the national organisations for the commerce, banking/insurance, cooperation sectors and professional offices. Up to now, these funds have published calls for the introduction of projects for continuing training.

The social partners have also taken part at national and at local level to a project of the Ministry of Labour and ISFOL<sup>5</sup> for continuous training for the social partners, which has been organised with the support of four universities.

The framework of actions was also used in the European Leonardo da Vinci programme, in which some social partners concluded joint projects, relating in particular to the priorities **analysis of competences requirements** and **recognition of competences**.

During 2004, Confapi, Confartigianato and CNA with the support of CGIL, CISL, UIL carried out research supported by the Ministry of Education about organisational models for technical training paths for continuing training in crafts and SMEs, which is based on the need to integrate formal and non-formal learning in order to define training paths which can be better tailored to the organisational needs of crafts and SMEs.

### **Actions taken at sectoral level**

The social partners and the Ministry of Labour have identified in ISFOL the subject which will have the aim of establishing a model for collating all the studies carried out since 1993 with a view to **identifying and anticipating competence needs** in various sectors.

In 2004 the social partners will also continue to develop cooperation with the public authorities, in particular by providing the latter with specific information on long-term trends on the labour market.

With a view to identifying solutions and applying best practice, the project known as FUTURISME I (the future of labour relations in SMEs) was created. This project, led by UEAPME (with the involvement of Confartigianato, CNA and Confapi), anticipates and prepares craft businesses and SMEs for the new challenges of labour relations

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<sup>5</sup> A Research Institute of the Ministry of Labour.

using new contents and types of training. A second project known as FUTURISME II allowed implementation and focused mainly of the results achieved regarding the specific theme of continuing training of workers.

Some collective agreements concluded at sectoral level also relate to the themes promoted in the framework of actions, for instance:

- **Single contract in the mechanical sector**

A single national contract for mechanical sector was concluded on 7 May 2003 and updated in 2004, and makes provision for workers in the form of lifelong learning. The system is now characterised by bilaterality at national and local level. This national contract was signed by Federmeccanica, Fim-Cisl, Uilm-Uil, with the exception of Fiom-Cgil.

The Bilateral Body at national level will aim to support planning and organisation of training for employees.

Worker co-investment is foreseen in terms of time through the use of hours accumulated in individual time accounts.

- **National contract in the mechanical sector for SMEs**

A national collective agreement in this sector for SMEs was signed on 29 May 2003 by Unionmeccanica-Confapi with trade union organisations CISL, UIL, with the exception of CGIL, confirming the importance of professional valorisation of human resources in order to increase employability and the quality of employment. Foreseen is a common evaluation for the institution of a National Bilateral Body having the aim to identify the specific training needs of the sector and to promote the organisation of adequate training for employees.

Training is recognised as fundamental for professional growth of employees in relation to technical, organisational and productive changes in enterprises. The promotion of training plans is foreseen also in order to increase competences and the vocational qualification of employees, by the conclusion of training agreements between enterprises and workers fixing their commitment to achieving training objectives taking into account costs incurred by enterprises.

- **Bilateral training body in the chemicals sector**

Federchimica and CGIL-CISL-UIL signed a collective agreement for workers in the chemicals sector, which makes provision for innovative measures in the area of continuing vocational training. In this context, the social partners have decided to set up a bilateral training body (OBC), with the aim of supporting training at the level of companies in the sector, notably on the basis of joint plans for competence development. The OBC has published a vademecum on training opportunities in the chemicals sector. Other initiatives are envisaged at both local and national level.

Federchimica and CGIL-CISL-UIL also signed an agreement on an apprenticeship contract in 2004.

- **National collective agreement for employees of SMEs in the chemical sector**

On 2 March 2004 Unionchimica-Confapi and the sectoral trade unions organisations of CGIL, CISL, UIL signed the collective agreement for workers of SMEs of chemical

sector, which makes provision of the National Sectoral Observatory with the aim of fostering sectoral training needs and to define training programmes for the enterprises of the chemical sector.

- **National bilateral body in the integrated services/multi-services and cleaning services sector**

On 5 February 2003, the national organisations of cleaning businesses and integrated services/multi-services (FISE, Unionservizi/Confapi, LegaCoop-Ancst, Confcooperative-Federlavoro, Agci-Ancosel) signed an agreement with the trade unions (Filcams-CGIL, Fisascat-CISL, Uiltrasporti-UIL) which makes provision for measures in the areas of employment, labour market and training and vocational qualifications. In this context, the social partners have envisaged setting up a national bilateral body in the integrated services/multi-services and cleaning services sector, with the aim of supporting training and vocational qualifications at the level of companies in the sector, analysis of competences needs and competences recognition for workers in the sector. Other initiatives are envisaged at both local and national level.

- **National collective agreement for employees of SMEs in the textile sector**

The national collective agreement of textile sector, signed on 4 May 2004 between Uniontessile-Confapi and the sectoral trade unions organisations of CGIL, CISL, UIL have decided to establish within the National Sectoral Observatory a Technical Bilateral Body with the aim of promoting quality on training and vocational guidance by identifying training needs connected to the sector and supporting planning of training for employees.

- **National collective labour contracts for employees of the craft/micro/small chemical, rubber-plastic and glass sector enterprises.**

This sector's national collective labour agreement, signed on July 11 2000 and still valid, between Confartigianato, CNA, Casartigiani, Claii and the trade union Confederations, CGIL, CISL and UIL, foresees, in view of promoting the realisation of vocational training courses for workers, the commitment of the parties in periodically evaluating the companies and the trades where there is a demand for qualified labour and in the meantime give presentations of these companies and professions to young people who show an interest in this sector.

- **National collective labour contracts for employees of the craft/micro/small construction enterprises**

The sector's national collective agreement signed on 15 June 2000, and currently being renewed, between the National Handicraft associations, Confartigianato, CNA, Casartigiani, Claii and the National Trade Union Associations, CGIL, CISL and UIL, seeks to inject impetus into vocational training of workers, the creation of Schooling Bodies or the improvement of those that already exist. These bodies, which are financed with contributions from the enterprises involved, have as an institutional aim the creation and promotion of adequate first training initiatives for youngsters entering the sector. They also have as their task the continuing training,

qualification, re-qualification, specialisation and updating of workers already present within the sector and the training needs arising from technological and legal innovations and new production processes.

- **National collective agreement and good practices for the employees of the postal sector**

In July 2003 Poste Italiane S.p.A. and Italian Trade Unions have signed a National Collective Agreement that will last until 2006. In the Agreement the Parts have given prominence to employment policies, in particular for young people and for better working conditions tools.

The Postal sector is rapidly changing moving towards modernization and high quality levels. In order to provide appropriate answers to the markets in terms of range of products and quality of services, training has a role of great importance. In Poste Italiane, training follows two main guidelines: adaptation and assumption of responsibility.

The joint adaptation and assumption of responsibility result can easily be found in Poste Italiane training projects whose aim is to identify new ways of doing "old" jobs. One best practice of this approach is represented by a project that considers the postman as the final quality point for customers. Three-day workshops were organised for postmen dedicated to: organisational change, new products and services, general information on quality of service. The aim of the project was to make postmen's activity more modern. Adding to the traditional delivery of postal items activity the value-added of providing a product and services information point, postmen are also representatives of the new Poste Italiane image in Italian society.

### **Good practice examples**

- **Chemicals sector: worker co-investment in continuing training**

Worker co-investment has been realised on the basis of voluntary and partial use of paid hours accumulated in individual time accounts in order to participate in continuing training courses.

This good practice, started as an experiment in 2001, has now been strengthened and makes provision for flexible use of working time.

- **Fondirigenti - Fondazione Taliercio**

Through this foundation, the social partners (Confindustria and Federmanager) have developed a questionnaire to enable managers and companies to use an online system for evaluating competences. The second phase of this project has consisted in disseminating the results for the benefit of all European managers.

- **Research on training needs for the handicraft sector**

In the craft sector, EBNA – National Bilateral Body of Handicrafts, – composed of Confartigianato, CNA, Casartigiani, CLAAI and CGIL, CISL and UIL, carried out a primary National Research on Training Needs, financed by the Labour Ministry. The research, whose method was based on instruments of structural, organisational and

capability analyses and possibilities for professionalism within the different areas of the sectors, has made it possible to define the frameworks of activity and areas of competence through which vocational handicraft knowledge can be mapped out, programmed and acquired, anticipating needs arising from innovations.

Following the successful National Handicraft Training Needs Research, EBNA has started a second research project – this time with the help of the European Social Fund – fitted into the area of a System of Action at national level for a permanent observation network for identification of professional and capacity needs.

In June 2004, during a national seminar, national research on training requirements was concluded by introducing the latest products.

- **National South/North-North/South Plan for territorial mobility**

During the year 2004, Confartigianato and CNA took part in the South/North-North/South Plan which was financed by the Ministry of Labour and Social Policies. The first phase of the plan was concluded last summer. The result was the creation of a network of private and state operators and the identification of means and facilities to support territorial mobility. The second phase of the plan began last October. This phase aims at organising stages on mobility for young people.

- **Research on “professional training for apprentices”**

In November 2004, in collaboration with two private research bodies, Confartigianato adjudicated a project commissioned by ISFOL6. It deals with research on professional training for apprentices by only studying specific professional profiles.

The project aims at examining the contents of professional training for apprentices by studying important planning experiences developed at territorial level.

- **National Analysis of Training Needs in Private SMEs**

National Analysis of Training Needs in Private SMEs carried out by ENFEA – National Bilateral Body for Training and Environment– created by Confapi and the trade unions CGIL-CISL-UIL.

The study which was conducted by Enfea can be summarised as follows:

- observing labour from an economic point of view (importance of competitiveness) and social support (employability and adaptability);
- designed to identify the factors that determine significant quality changes in the medium term;
- express as modification of learning which constitute competence of the vocational figure under study (professional requirements);
- the scope to support the programming process (definition of priority and logic of the offer) and the course of the project (orienting educators towards a detailed analysis of the single contests object of the intervention);
- in a logic of integration between global (State and Region) and local (single territorial productive system) levels.

During 2003 and 2004, a similar National Analysis of Training Needs, made by social partners on a bilateral basis, was carried out in other sectors (industry, cooperation, banking, etc.).

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<sup>6</sup> A Research Institute of the Ministry of Labour.

## Latvia

### Sources of information

- Trade unions: LBAS (Union of Independent Trade Unions of Latvia), member of ETUC
- Employers: LDDK (Latvijas Darba Deveju Konfederacija), member of UNICE

### **Actions taken at national level**

The national programme for lifelong learning in Latvia was adopted on 2 December 2004. This means that we are only at the beginning of this important process.

Nevertheless the continuously changing labour market situation creates the need for acquiring new knowledge and skills, in order to remain competitive in the labour market; hence the increased importance of consultancy and professional development guidance services. Providing lifelong learning opportunities to persons with a low level of basic skills and education is particularly significant.

In order to establish a single management system, the government has adopted a decision on restructuring schemes for decentralisation of vocational education and training establishments and bringing them under the control of the Ministry of Education and Science.

The development of lifelong learning systems in Latvia started in 1993 with establishment of the Latvian Adult Education Association. As of today, a network of adult education centres and coordination entities has been developed at the municipal level.

As regards the development of lifelong learning, a strong positive impetus is provided by finalised and adopted legislative acts in general, vocational and higher education, and the well functioning Educational Law setting the basic principles for the educational system in Latvia. The overall development level of the network of educational and educational support institutions in Latvia is optimal. The Tripartite Council for Cooperation in Vocational Education and Vocational Education Cooperation Council have been established.

### **Actions taken at sectoral / regional level**

However, due to the slow implementation of territorial and administrative reform in Latvia, planning and effecting regional development initiatives is complicated, creating considerable obstacles to the development of human resources.

The training, consultation and information activities aimed at adult farmers and inhabitants of rural areas are implemented by the Latvian Agricultural Advisory and Training Centre. Continuing adult education involves persons of different educational level and background (primary education, secondary education, vocational education, university level non agricultural education) by offering lifelong learning opportunities and participation in various programmes aimed at increasing the competitiveness of products and developing non-agricultural businesses.

The national programme "Developing and Implementing Lifelong Learning Strategy" was elaborated in the form of 6 simultaneous projects – one for each planning region. The above programme is aimed at establishing regional support systems and capacity-building for implementing and enhancing the lifelong learning strategy.

The process of establishing Tripartite Councils for Cooperation in Vocational Education has commenced in the regions of Latvia. Employers were involved in the development and assessment of occupational standards, methodological aids and guidelines for developing vocational education programmes were elaborated, consultancy services were rendered on developing vocational education programmes, the schemes and contents of centralised vocational qualification exams were worked out, the standard of professional development programmes for adult education teachers/ professors was approved.

One particular sector should be emphasised and it is banking sector. The Association of Commercial banks of Latvia has its own training centre. Training is aimed at increasing of qualifications and skills for bank sector employees at different levels.

### **Actions taken at company level**

In general it can be observed that more and more employers understand that they will benefit more from skilled and trained employees. Employees probably have better chances to attend courses paid for (mainly) by the employer, and employees have higher motivation to participate in the courses/seminars. Nevertheless it is obvious that big enterprises have better opportunities to provide training for their workers than SMEs.

Results of the lifelong learning survey (2004-Latvia) reflect the following:

- In general, lifelong learning in its different forms is fairly popular in Latvia.
- Educational activities are still a priority of young people. However, survey data show that lifelong learning comprises various groups of working age population.
- Non-formal learning at courses/seminars and informal learning (self-education) is more prevalent among women than men. However, men participate in longer-term education more often than women.
- Participation in formal education and course/seminars is not equally accessible to the populations of all regions.
- Access to formal and non-formal education at least partly depends on income. As a result, those people who most need education and training for improvement of their economically inactive population have different levels of access to education. Survey data emphasise the possibility of risk of social exclusion for job-seekers because this category reports lower participation in education. Populations with a low educational level participate less in formal and non-formal education.
- In general, data show that Latvia still needs to work hard to implement the strategy of the Lifelong Memorandum.

## Lithuania

### Sources of information

- Trade unions: Lithuanian Trade Union Confederation (LPSK)
- Employers: Lithuanian Confederation of Industrialists (LPK)

### Actions taken at national level

At national level social partners are involved in several initiatives, which supported the objectives of the framework.

The structure of the Lithuanian education system and the types of educational institutions and study establishments are defined by the Law on Education, the Law on Research and Studies, the Law on Vocational Education and Training, the Law on Non-formal Adult Education, and the Law on Higher Education. The state regulates and controls formal education, i.e. development, learning and studies, successful completion of which leads to a state recognised diploma or certificate. Non-formal education is organised on the basis of the Constitution of the Republic of Lithuania, the Law on Education, the Law on Non-formal Education, and other laws and statutory documents.

The national strategy of lifelong learning in Lithuania and action plan was adopted on 26 March 2004. Representatives of social partners participated in a working group for preparation of strategy.

Social partners participated in discussions and preparation activities of Strategic Guidelines for Development of Education for 2003 – 2012, which provides a practical vision of the Lithuanian education that guarantees quality of education and life learning. Among the aims of the guidelines: all residents of Lithuania not having acquired the required education and qualification are invited to study and acquire education and qualifications. This aim is achieved also through bridging formal, non-formal and informal education: introduction of module-based teaching in certain education links and developing the procedure for accreditation of modules on both formal and non-formal education, the system for formal recognition of competences acquired in non-formal and informal way.

In 2004 social partners participated in the conference "Transparency And Recognition Of Qualifications: Challenges And Perspectives For New Member States" discussing the proposal for creation of National Qualification System Management Scheme. According to this scheme, a new Board of Qualifications should be established, which defines the standard for the qualifications framework as well as development principles; defines requirements for the structure of qualifications and accredits them (includes in the framework); defines requirements for occupational standards, coordinates their preparation and approves them; defines requirements for institutions awarding the right to assess qualifications of individuals and accredits them; monitors the activities of institutions awarding the right to assess qualifications of individuals.

According to the proposals, the Board will work together with institutions preparing occupational standards, institutions awarding the right to assess qualifications of individuals and institutions responsible for qualification assessment and awards. These institutions should report to Lithuanian Vocational Education Council,

Social partners have the possibility to participate in the Lithuanian Vocational Education Council, Lithuanian Labour Exchange Council, regional labour exchange councils, working groups.

Lithuanian Trade Union Confederation (LPSK) participates in the Equal project "Support Network for Pre-retirement Age People's Reintegration into the Labour Market in Vilnius and Utena Regions", planning to exercise the motivation, occupational orientation and education of pre-retirement age people, to prepare new models for re-skilling, to inform and support and provide guidance for them for obtaining new competences and qualifications. Lithuanian Confederation of Industrialists (LPK) is also going to join this project in 2005.

### **Actions taken at sectoral level**

Lithuanian Confederation of Industrialists (LPK) organises LPK Presidium sessions, consultative sessions, seminars about professional training. Participants in these events are human resources specialists and experts from the branch and regional associations. Seminars are carried out by experts in HR from Lithuania and Germany

Lithuanian Trade Union Confederation (LPSK) has its own training centre which organises basic training for trade union representatives on legislation, collective bargaining, discussions on national education strategy documents.

Sectoral Trade Unions of Lithuanian Trade Union Confederation (LPSK): Lithuanian Education Workers Trade Union and Lithuanian Nurses Union organises vocational education for their members giving them recognised certificates.

### **Actions taken at company level**

Lithuanian Confederation of Industrialists (LPK) has concluded several agreements with Lithuanian Universities and jointly organises training courses and consultative meetings in order to create a basis for the lifelong development of qualifications for the members of the Confederation. LPK as a social partner recognises the great importance of training and qualifications improvement among both employees and managerial staff. LPK is involved in different actions targeted at improving the quality of education in Lithuania.

Lithuanian Confederation of Industrialists (LPK) has organised a number of seminars on the possibility to use EU funds in order to train employees. Great importance is attached to both professional training as well as general training, including language courses.

Lithuanian Confederation of Industrialists (LPK) regularly sends its members to the national and international meetings and seminars on development of vocational training and lifelong learning.

Training centre of Lithuanian Confederation of Industrialists (LPK) organises continuing adult education which involves persons of different educational level and background by offering lifelong learning opportunities and participation in various programmes aimed at increasing competitiveness and developing businesses.

A number of collective agreements have been concluded at the company level. A vocational training of employees is the part of the content of the mentioned collective agreements.

Lithuanian Trade Union Confederation encourages member unions at enterprise level to include questions linked to Vocational training in collective agreements (needs, participants, financing, leave).

## Luxembourg

### Sources of information

- Trade unions: CGT-L (Confédération Générale du Travail de Luxembourg) and LGGB (Union of the Christian trade unions of Luxembourg), members of ETUC
- Employers: FEDIL (Federation of Luxembourg's Industrialists), member of UNICE; FdA (Craft federation) and Chambre des metiers (Chamber of craft), members of UEAPME

### Actions taken at national level

#### Employers

- Initial training courses devoted to apprenticeship and continuing vocational training courses are provided by professional employer chambers (notably IFCC - Institut de Formation de la Chambre de Commerce and Centre de Formation de la Chambre des Métiers) as well as by employer organisations through their specialist institutes such as Institut de Formation Bancaire de Luxembourg (banking) and Institut de Formation Sectoriel du Bâtiment (construction);
- Organisation of courses and conferences on topics such as staff representation and secondment of workers by professional chambers and federations;
- Organisation of courses in the Luxembourg language.

#### Trade unions

- The two trade unions which are representative at national level intensified their efforts in terms of training courses for personnel delegates as well as for their members through their training centre IFES (Institut de formation économique et sociale).

### Actions taken at sectoral level

#### Employers

- Completion of two studies on manpower studies in the industry and craft sectors;
- Study on continuing vocational training needs in the industry sector;
- Organisation of continuing vocational training courses for passenger transport (buses and coaches);
- Creation, in cooperation with ADEM, of a pool of replacement workers in the commercial sector;
- Creation, with the cooperation of ADEM and the Luxembourg Ministry for Education and Vocational Training, of a course to integrate manufacturing and security employees in the labour market;
- Organisation of training courses in the furniture sector and passenger transport sector;
- The "Luxembourg School of Finance" created by the Luxembourg state in cooperation with the banking sector recently started to offer highly specialised

courses in the area of financial and economic research at third-cycle level (MBA).

#### Trade unions

- Continuing vocational training courses are provided by the professional employee chambers, the Chamber of Labour and the Chamber of Private Employees, as well as by specialist institutes.

#### Joint actions

- The social partners in the health sector have put in place and jointly finance a vocational training centre (CFPC Dr R. Widong);
- An agreement has been concluded in the assistance and care sector and in the social sector. This agreement provides for the availability of an annual quota of hours for training needs for all relevant employees in this sector;
- Similar agreements have been concluded in the financial sector and automotive sector;
- Created in 2002 by the construction and public works sector, on the basis of an agreement between social partners negotiated in the framework of the construction sector's collective labour agreement, Institut de Formation Sectoriel du Bâtiment (IFSB) has put in place the first training courses, notably to integrate the unemployed in the labour market, and has continued to develop its programme.

#### **Actions taken at company level**

In a number of companies, the social partners have negotiated agreements governing their employees' access to training measures. The details of these agreements are incorporated in the respective collective labour agreements.

## Malta

### Sources of information

- Trade unions: CMTU (Confederation of Maltese Trade Unions), member of ETUC
- Employers: MFOI (Malta Federation of Industry), member of UNICE

### Actions taken at national level

With reference to the development of competencies and qualifications, the Maltese Government, by means of Legal Notice 215 of 2000 entitled; 'Malta Professional and Vocational Qualifications Regulations, 2000' set up a council namely; 'Malta Professional Vocational Qualification Awards Council' (MPVQAC). Section 4 of this Legal Notice enlists the aims and objectives of this council as being:

- to establish and maintain a framework for the development, recognition and award of professional and vocational qualifications based on standards of knowledge, skill or competence to be acquired by learners;
- to promote and facilitate life-long learning access, transfer and progression;
- to foster the recognition abroad of professional and vocational certificates awarded in Malta under these regulations.'

The Legal Notice also includes a provision as to who is to be appointed member of this Council, which amongst others includes representatives;

- from the Employment and Training Corporation (ETC),
- from the Education Division,
- from the Malta College of Arts, Science and Technology,
- from the University of Malta,
- from Employer Organisations,
- from Trade Unions,
- of Vocational Education

The MPVQAC, during the first two years of its existence, met regularly, prepared strategies and even explored the possibility of cooperation with other similar councils in the EU. In fact, a close relationship with the Scottish Qualifications Council was established.

Nevertheless, over the last two years, all the initiatives which had started off could not proceed further, due to the fact that no appropriate budget allocations were made by Government. The situation today is that the MPVQAC is in fact dormant as far as the employer and union members on council are aware.

## The Netherlands

### Sources of information

- Trade unions: FNV (Federation of Netherlands Trade Union) , MHP (Trade Union Federation for Intermediate and Higher Employees) and CNV (National Christian Trade Union Confederation), members of ETUC
- Employers: VNO-NCW (Confederation of employers and industries), member of UNICE; MKB-Nederland (Royal Dutch Association of SMEs), member of UEAPME; LTO (Dutch Association for Agriculture and Horticulture)

### Introduction

As a consequence of budget-restraints, since January 2004 some additional fiscal facilities for the deductibility of companies' training costs, are no longer available. Special incentives now only exist for forms of dual vocational education. The normal rule that training costs are deductible from pre-tax profits, has not changed. This reduction in the fiscal incentives and the withdrawal of some special measures, for example for employees aged 40+ and for employees of small firms, were regretted by both social partners.

The government, in good cooperation with social partners, has taken action vis-à-vis the European Commission to change the EU rule that training funds collected on the basis of (legally binding) collective agreements are considered by the EU to be state aid. Argument of both Government and social partners is that the funds are collected from the private side and should therefore be considered as private investment in training. The outcome of this debate is important, because several of the bipartite funds are interested to participate in ESF programmes and co-finance programmes partly with money from the bipartite funds.

### Actions taken at national level

Social partners gave advice for a renewal of the arrangement for the nation expert centre for assessment of prior learning APL. A new arrangement, lasting 3 to 4 years, will be set up, based on continuation of support from the government (the ministries of Education, Economic affairs, Social Affairs and Agriculture) , but also on increased private income from services. The perspective is that APL will become an important instrument in Lifelong Learning policy and companies and branches will use it increasingly. The costs of APL will be compensated by more efficient training programmes that take into account the competences acquired from working experience.

In November 2004, the government has announced an action plan for Lifelong Learning. For 2005/2006, in early 2005 a Task Force will be set up, to implement the action plan and to advice on further policies for Lifelong Learning. Representatives from social partners will be members of the Task Force. The Task Force will be asked to stimulate private HRD-investments also being directed to goals

that are set in the Lisbon perspective, such as to train the lower-skilled up to at least a first vocational qualification and to facilitate upgrading courses up to tertiary level. Another proposed action is to develop, with the involvement of social partners, a digital online market place for the supply of training courses.

### **Good practice at sectoral level**

In the branch of private employment agencies (ABU), social partners have agreed to set up a bipartite fund to stimulate the training of temporary workers. For workers who have been under contract to the agency for a longer period, a personal development budget will be available.

In academic hospitals, a pilot has started for nursery professions to work with portfolios that give an up-to-date picture at any moment of experience and competences of the employee.

In the branch of trade in building materials (HIBIN), the training is redesigned into a modular competence-based and problem-driven training system. It supports development of technical knowledge and skills as well as commercial skills. Related to this, a "skills monitor" has been developed, which is a web-based tool to analyse the competences needed for specific functions in relation to the competences that are acquired by the employee or are to be acquired by further training.

In the engineering branch (FME-CWM and trade unions from industry), social partners have launched a programme to support the development of an instrument for assessment of prior learning. At the same time a project was established with 5 Higher Vocational Education institutes to cooperate in the development and implementation of the instrument. Also in this case, the results of the assessment will be used as a basis for the planning of further training.

### **Good practice at company level**

Several companies (Brocacef Holding, Solvay Draka) give employees the facilities to qualify for the European Computer Drivers Licence.

Rabobank integrated the setting of goals at the beginning of the year for that year's results and the arrangements for support by coaching and training to achieve the results. Besides this, in agreement between employer and employee, a personal development plan has been set up for long-term development and employability in future jobs.

## Norway

Sources of information

- Trade unions: LO (Landsorganisasjonen I Norge), member of ETUC
- Employers: NHO (Confederation of Norwegian Business and Industry), member of UNICE; Norwegian section of CEEP

### **Actions taken at national level**

- **to identify and anticipate competence and qualification needs**
- Vox barometer

VOX is the national institute for adult learning. The Vox barometer is a contemporary survey of attitudes and opinions concerning formal and informal learning in the Norwegian workplace, from both the workers' and the management's perspective.

Autumn 2004 the barometer looks into attitudes and experience relating to the following topics:

- On-the-job learning
- Learning activities
- Motivation for learning
- Innovation
- Digital skills

- The Norwegian Competence Report

The Norwegian Competence Report aims at providing a more comprehensive account of competence as a driver of innovation, value creation, quality of life, wealth and welfare in Norway. The Competence Report will present an improved basis for policy-making in areas where competence and learning are key factors. It will contribute to strengthening public debate and identify areas in which there is need for new initiatives. Moreover, the Ministry intends to use this international opportunity for benchmarking the status and activation in a sample of competences. It wishes not least to establish a work method and an approach that will allow the monitoring of developments in Norway over time. More information at <http://www.kompetanseberetningen.no/>

- Learning Conditions Monitor

Fafo Institute for Applied Social Science presents indicators, data and analyses from the Learning Conditions Monitor 2003. Learning conditions is a collective term for factors affecting learning and development of competence by individuals. The Monitor includes a number of learning conditions indicators. In addition to participation in various forms of learning, the indicators measure individual learning needs, motives for and obstacles to learning, various characteristics of the workplace

as an environment for learning, and features of the education and training programmes.

- **to recognise and validate competences and qualifications**
- Recognition of prior learning: higher education

Refine. The admission and exemption procedures related to non-formal and informal learning students in higher education are thinly documented. The REFINE project will create a basis for such documentation. The main objective of the project is to investigate the practice of granting exemption(s) from a study program/degree based on documented non-formal and informal learning in higher education. One or more national tools for documentation are used to provide a portfolio of documents for assessment. A main objective is to provide a basis for discussing exemption in higher education, as well as investigating the demands such a candidate will meet and how these demands may be met. The final report from the REFINE project will be made available from January 2005.

- The NOKUT project

NOKUT (The Norwegian Agency for Quality Assurance in Education) runs a project uncovering the problems facing refugees lacking documentation of education and work experience. The project focuses on people with formal, but undocumented, higher education. Acceptance of foreign education is another factor discussed in this project.

- **to mobilise resources**
- The Competence Building Programme

The Competence Building Programme (KUP) was established in autumn 1999. KUP is one of the strategies for the implementation of the Competence Reform. Its rationale is that the market for further education of workers does not function as well as it should. KUP is led by a board elected by the Ministry of Education, following nominations from the social partners and the ministries involved. Up to the present date, KUP has given grants for approximately 700 projects. In 2004 the main activity was dissemination of good practice.

- Financing leave of absence for training as well as on-the-job training.

Workers have a statutory right to leave of absence for educational purposes. Within the framework of the Competence Building Programme, the social partners are developing a pilot project for financing cost of living for employees taking leave of absence for educational purposes, or for on-the-job training. The project will be based on voluntary participation from the employer as well as the employee, and is based on tripartite financing.

- Competence-building for teachers

In the budget for 2005 the Ministry of Education has allocated NOK 500 million (= € 60 million) for additional training for teachers and for a competence-building

programme for them - included in this category are also the personnel who guide and teach trainees in the enterprises.

### **Good practice examples**

The university college of Østfold, in cooperation with the relevant industrial sector, has developed a course in chemical engineering where the students practice their skills in an enterprise throughout the entire course. Ordinary students along with skilled workers are accepted for the course. So far, this has been a success for both the students, the enterprises and the college. Many other university and college courses would be suitable for such "higher education apprentice schemes."

The university college of Gjøvik has developed a master's programme in project work aimed at people who already have a job, again in cooperation with the relevant employment sector. Here, the focus is on solving tasks that the students are given as part of their existing job. In other words, the student is formally rewarded for non-formal learning in his or her job.

The county of Sogn og Fjordane, in cooperation with VOX, has launched a project where the main objective is value creation through skills. The project aims at getting in touch with at least 100 enterprises in order to start the documentation of non-formal skills in the enterprises, so that the individual and the enterprise realise which skills they have, and what is needed to achieve value creation. With a view to focusing on skills, Vox is launching a campaign in the entire county where local ambassadors get in touch with local enterprises and union representatives in order to create interest for the project.

In the Local and Regional government sector the social partners have established and are financing together a fund for Education and Development of managers to be better employers and the workers' representatives to be better union leaders. These competences create better mutual understanding in the workplace

## Poland

### Sources of information

- Trade unions: NSZZ "Solidarnosc" (Independent and Self-Governing Trade Union "Solidarnosc"), member of ETUC
- Employers: Polish Confederation of Private Employers (PKPP), member of UNICE; Polish Association of Craftsmanship (ZRP), member of UEAPME; Confederation of Polish Employers (KPP), member of CEEP

### Introduction

The Polish Confederation of Private Employers (PKPP), the Polish Association of Craftsmanship (ZRP), the Confederation of Polish Employers (KPP), and NSZZ "Solidarność", as well as other social partners who are representative under Polish law, are active both on the national and sectoral level in the field of lifelong development of qualifications and competences. Actions taken by social partners have had a particular influence on SMEs. Support of this sector in the field of training and education of workers is one of the priorities of the National Plan of Actions for Employment in 2004. The plan defines a number of actions for the development of qualifications and competences, such as:

- creating a national system of information about opportunities of lifelong learning in some regions of the country;
- building the network of regional centres for distance learning (e-learning);
- developing standards of professional qualifications; and
- introducing modulus programmes in professional education.

Moreover, social partners, as members of the Tripartite Commission of Social and Economic Affairs, have participated in creating new regulations on education and training. In April 2004 the law on labour market institutions came into force. The statute includes provisions on training funds and certain instruments which can facilitate development of competences and qualifications.

Additionally social partners promote the use of structural funds (particularly the European Social Fund). Structural funds play a key role in the development of training and competences, especially in the SME sector.

It should be emphasised that Poland is in the process of reforming its educational and training system. The main efforts of the reform are focused on introducing unit systems (modulus systems) into professional education.

### Actions taken at national level

- The new statute on labour market institutions introduces an obligation for Labour Offices to identify competence and qualifications needs of local labour markets as well as new institutions of lifelong learning and training at company level. One of the important institutions is the Company Training

Fund. The aim of the Fund is to support development of employees' qualifications and competences at the company level.

- Support of development of qualifications and competences was defined as one of priorities in the National Plan of Actions for Employment. Social partners participated in the consultations of the National Plan and emphasised the necessity of professional education and competences to be further developed (in particular the SME sector);
- There is a wide information campaign carried out by governmental institutions and social partner organisations about the possibilities of using the European Social Fund to develop training and competences programmes;
- The Polish Agency of Entrepreneurship Development published guidelines and special application forms for entrepreneurs who apply for funding from structural funds. Social partners play an important role in the process of using structural funds. Social partners have representatives in Steering Committees and Monitoring Committees which make recommendations for training projects which can obtain structural help. The majority of the projects concentrate on the development of qualifications and competences.
- The Government Centre for Strategic Studies carried out research about human resources supply and demand in Poland. The published results are a good source of information to identify competences and qualification needs. According to the research the structure of employment in Poland differs significantly from the structure in EU countries since the majority of the Polish population continues to be employed in traditional branches of industry and agriculture. Therefore Poland should concentrate on developing human capital in the third sector through building a knowledge based society.
- One of the priorities of educational reform is building lifelong learning systems. The aim of the reform is to generate opportunities for developing qualifications and skills during lifecycles of professional activity.
- The introduction of elements of unit systems (modulus system) into professional education is the crucial part of the educational reform. The modulus system in professional education is one of the standards of modern education, and when introduced it will allow for more efficient types of education, especially in the vocational field.
- The Association of Craftsmanship (ZRP) cooperates with the Ministry of National Education to create appropriate conditions for professional education in entrepreneurship. The Crafts sector employs over 100.000 young workers. All of them have employment contracts, and the purpose of the contracts is for professional education. Additionally, ZRP educates young workers in over 107 professions. This professional education is organized by ZRP in order to support the national system of professional education. Employment training for young workers is financed by the Labour Fund.
- Additionally ZRP has the competence to examine young workers after they have completed their practical education at company level. ZRP organises all processes of examination (i. e. preparing commissions, certificates and

register of results). Certificates, which are received by workers, are confirmation of qualifications in certain branches and they are recognised by employers on the labour market.

- Social partners have signed several collective employment agreements. One of the crucial aspects of collective agreements is the development of professional education and competences. NSZZ "Solidarność" plays a crucial role in negotiations on collective employment agreements. In the agreements employers commit themselves to train their employees in specified time frames.

### **Actions taken at sectoral level**

- NSZZ "Solidarność" participates in European programmes for the improvement of qualifications, for instance through the EQUAL initiative to support lifelong learning of older workers (above 50) in the ship industry. The aim of the project is to create training possibilities for older workers and to promote educational activity throughout professional life.
- PKPP organises seminars about professional training at the regional level. Seminars are carried out by experts in HR and representatives of the Ministry of Education.

### **Actions taken at company level**

- **PKPP**

PKPP is preparing projects for Consulting and Training Firms. The aim of the projects is, on the one hand, to create a basis for the lifelong development of competences and qualifications for the members of the Confederation. The second purpose is to improve the offers of Training Firms for the companies by precise identification of employers' needs (see below: 'examples of good practice', point b).

PKPP carries out annual research on SME sector needs. The result of the research is presented to the Association of Consulting Firms and on this basis they prepare their proposals for the entrepreneurs (also in the field of qualifications and competences).

PKPP organises seminars about professional training at the regional level. Seminars are carried out by experts in HR and representatives of the Ministry of Education. During the seminars there are consultations for companies on various HR related topics.

- **KPP**

The Confederation of Polish Employers as a social partner recognises the great importance of training and qualifications improvement among both employees and managerial staff. Given the above, KPP is very much involved in different projects and actions targeted at the improvement of the quality of education in Poland.

KPP has submitted its opinion to the Ministerial Proposal of the Educational Reform.

So as to make better use of the structural funds a special department in the Confederation has been established which is responsible for developing a large number of training projects. The Confederation not only participates in the projects as a partner, but informs its members on the training possibilities. A number of seminars have been organised together with a campaign on the possibility to use EU funds, especially the European Social Fund, to train employees. Great importance is attached to both professional training as well as general training, including language courses.

KPP regularly sends its members to meetings and seminars organised by the European Centre for the Development of Vocational Training, and the staff members benefit from the Community study visits programme for those responsible for vocational training.

### **Examples of good practice**

- Regional Associations of Employers participate in Agreements for the development of qualifications and competences which are signed between local authorities and employers as well as between trade unions and employers;
- One of the projects carried out by PKPP is "Confederates for Confederates". The aim of the project is to create training offers for companies (members of PKPP) by consulting firms which are also members of PKPP;
- PKPP has created a Board of HR Directors. The board discusses the crucial issues of development of competences and qualifications. The recommendations of the Board are taken into account during preparation of training projects for employers;
- In 2003 ZRP created the Branch Council. One of its objectives is to prepare training projects for certain branches. The aim of the projects is to develop competences and qualifications in certain branches. Moreover ZRP organises competitions about professional knowledge and competences; and
- NSZZ "Solidarność" has organised its own Labour Offices. The offices support unemployed people and offer assistance in obtaining professional education. NSZZ carried out training for workers in branches of the economy undergoing restructuring.

## Portugal

Sources of information

- Trade unions: UGT (General Workers Union), CGTP-IN (General Confederation of Portuguese Workers), members of ETUC
- Employers: CIP (Confederation of Portuguese Industry), member of UNICE

### **Actions taken at national level**

- **to identify and anticipate competences and qualifications needs**

As revealed in the previous follow-up report, the Framework of Actions for the Lifelong Development of Competences and Qualifications, signed by the European Social Partners in 2001, has not yet found the right conditions to be executed in an articulated manner among the Portuguese social partners.

In 2003, the Government presented to Social Partners a Draft Law on Vocational Training. This Draft Law was deeply criticised by the Social Partners, in such a manner that the Government decided to withdraw it. A new version of the Draft Law on Vocational Training was presented only on 13 January 2004.

Social Partners disagree with some aspects of the new version – specially the ones regarding the financing of Vocational Training – but there was a consensus around the principle inserted in article 4 of the Draft Law, regarding the need to elaborate a strategic document, designated as Pluriannual Programme for the Development of Vocational Training. The Government would approve this Pluriannual Programme after the advice of the National Advisory Committee on Vocational Training (this committee has a tripartite composition).

The Pluriannual Programme for the Development of Vocational Training would include the identification and anticipation of competences and qualifications needs, at national, regional and sectoral levels.

The Draft Law on Vocational Training was submitted to the Portuguese Parliament in August 2004. However, after the recent resolution of the President of the Portuguese Republic to dissolve the above-mentioned Parliament, there will be a general election, and it is too early to say if the new parliament will approve the Law.

- **to recognise and validate competences and qualifications**

In Portugal, the Social Partners participate in the **National System for Professional Certification**. This System aims to certify the competences of workers, however those competences have been acquired, that is either through vocational training, labour experience or vocational training undergone in another country, namely in the European Union.

Within this System, representatives from Social Partners and from the Institute of Employment and Vocational Training (IEFP) continued their work during 2004 on

approving occupational profiles and manuals for workers' and trainers' certification in the respective areas. Although a great effort has been made concerning this work a lot of work is still to be done.

The **Network of Centres for Recognition and Validation of Lifelong Competences and Qualifications**, created within the scope of the tripartite Agreement on Employment Policy, Labour Market, and Education and Training, signed in 2001, has been both reinforced and widened. These centres will allow the recognition and validation of competences of workers over 18 years old who do not have diplomas, in spite of having acquired competences throughout their working lives through informal or non-formal learning. The first phase was launched in the year 2000 and allows educational certification equivalent to either 4, 6 or 9 schooling years. The second phase, which started in 2004, allows vocational certification in some branches, for a start.

Presently this Network system is still not well known. However, Social Partners value this Network of Centres and make efforts to inform companies and workers, since the system gives them the opportunity to obtain progress concerning both career and a new training direction.

- **to inform, support and provide guidance**

During the discussions on the above-mentioned Draft Law on Vocational Training, the Portuguese Social Partners have given their strong support to the principle, foreseen in article 16, that the organism responsible for the execution of employment and vocational training policies should inform, support and provide guidance to companies and workers in matters linked to development of competences and qualifications, since the companies and workers finance the activities of this organism through the payment of social contributions. CGTP-IN defended the creation of means for Information, Counselling and Guidance, especially for workers.

In the framework of national tripartite negotiations on the so-called Social Pact for Competitiveness and Employment – these discussions are taking place in the Standing Committee for Social Dialogue – two important proposals are being discussed: one is intended to create a national database on vocational training needs at national, regional and sectoral level; the other intends to reinforce the relationship between the service responsible for the execution of employment and vocational training policies and private companies.

- **to mobilise resources**

During the discussions regarding the Draft Law on Vocational Training and during the negotiations on the Social Pact for Competitiveness and Employment, CIP defended the view that the companies which wish to carry out the training of their employees themselves should keep the disaggregated part of social contributions earmarked for the Vocational Training.

On the other hand, a recent study made by the public Institute for Quality in Vocational Training (IQF) – “Finance Practices of Vocational Training in Portugal” – reveals that, among the Portuguese companies surveyed in that study, the large majority of companies that carry out vocational training actions finance them with

their own resources. The study shows that 11.8% of the total number of companies surveyed carry out vocational training.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

A **Partnership** document – the “Strategic Plan for the Development of Human Resources in the Tourism Sector” – concerning the tourism sector was signed by several public authorities and by the tourism social partners. This Partnership aims to identify competence and qualification needs, as well as develop human resources for the sector for a period of ten years. Within this framework, tripartite juries are being constituted, so that youngsters who have completed courses in the Vocational Training Centres directly managed by the IEFPP can take exams and be duly certified.

Several occupational and prospective studies at sectoral level are taken place by the IQF. These studies are a fundamental tool for improving vocational training quality, since they make it possible to build referentials concerning the necessary competences to improve competitiveness.

On the other hand, Employer Associations, and the Vocational Training Centres that are jointly managed by the IEFPP and Employer Associations, have developed numerous activities in order to identify and anticipate competence and qualification needs at sectoral level. For example, the Vocational Training Centre (CINEL) jointly managed by the IEFPP and the employer association for the electric and electronic sector (ANIMME), has already identified vocational training needs for the sector in 2005, the methods to carry out training actions that correspond to those needs, and has also developed several training manuals.

- **to inform, support and provide guidance**

The employer association for the metallurgic and metal sector (AIMMAP) is currently collecting finance and technical resources in order to assume consulting functions in the area of vocational training for its associated companies.

CINEL has developed the “Rede Programme – Consulting, Training and Support the Management of Small Companies”. Through this Programme, CINEL supports and provides guidance to small companies’ management, aiming to enhance their competitiveness.

### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs**

In Portugal, medium and large companies usually have a specific system to identify and anticipate competence and qualification needs. For example, in order to identify its competence and qualification needs, a Portuguese bank organises approach cycles on themes which are transversal, aiming at improvement of the performance of its workers. After this stage, the bank analyses the specific needs of one worker or a small group of workers and, finally, assesses the possibility to extend the

training to other workers who have the same needs. However, small and medium enterprises represent about 98 per cent of all enterprises in Portugal and the great majority of this kind of enterprise do not carry out vocational training actions, except for the training that they provide to workers in a non-formal way.

It is important to stress that a number of projects involving both companies and trade unions, related to European programmes or initiatives, are being developed. These projects concern both diagnosis of needs anticipation and developing vocational training in the following areas: Gender Equality; Equality regarding immigrants, disabled; Occupational Safety and Health and Drug Addiction.

- **to recognise and validate competences and qualifications**

Some Portuguese companies which carry out vocational training actions perform evolution tests at the end of the training actions, in order to recognise and validate competences and qualifications acquired by their workers. In the case of other companies, external training actions are provided by vocational training entities duly accredited by IQF.

- **to inform, support and provide guidance**

Some Portuguese companies which carry out vocational training actions support and monitor the lifelong learning path of their workers, from the moment they begin to work in the company until the day they leave. Other companies disseminate, through their own private communication systems (e.g. intranet), procedures and other relevant information, as well as Seminars and Conferences on relevant themes of interest, to support and guide the activities of their workers.

- **to mobilise resources**

Some SME co-finance or use public funding to provide training actions for their workers.

### **Good practice examples**

The ReQual project involves CGTP-IN, 22 enterprises from several industries (metal and engineering, construction, shipbuilding, printing, retail trade, handicraft, restaurants and hotels), and the regional authorities of Setúbal, and meets several guidelines included in the European action framework. This project establishes a partnership between the most important groups that are interested in the improvement of qualifications: workers and their representatives, enterprises, national and local public bodies, and it develops innovative practices in a labour context. The competence needs diagnosis, as well as the training response, are carried out in a work context (blended learning training) and under conditions jointly decided by all partners involved, harmonising working and non-working times and respecting work and family life.

In the electric and electronics sector, CINEL has created a special certification system for a company that provides cable TV. This system is based on a digital database platform that enables the company, workers in training and two entities in charge of training (one in Lisbon and the other in Porto), to access, monitor and evaluate the

individual training evolution of the 900 workers dispersed nation-wide. This system has made possible the evaluation of 140 workers in 15 days, with only 14 people involved in the process.

UGT is involved in a pan-European project on protecting workers from passive smoking entitled Smoke at work. The project is being coordinated by the TUC in the UK and steered by union representatives from seven European countries (Portugal, Belgium, Denmark, Ireland, Sweden, Romania, and the UK). The project is particularly focused on those people who work in the leisure industry - who are most at risk from the effects of passive smoking because their exposure is least likely to be controlled. The project has two main objectives: to test some training materials and to spread the project results through the project's website, namely activities UGT has been developing, such materials being tested in a 10-hour training action directed to union representatives and information actions in our member unions for which some important awareness-raising materials have been created.

## Slovenia

### Sources of information

- Trade unions: Association of Free Trade Unions of Slovenia, member of ETUC
- Employers: Employers' Association of Slovenia, member of UNICE; Chamber of Craft of Slovenia, member of UEAPME

### Actions taken at the national level

In 2004, partners cooperated in planning vocational and professional training at all levels, defining knowledge standards, adopting training programmes and their implementation. The quality vocational and professional training was based on combining training courses at school and on-the-job training.

The quality vocational and professional training combined training courses at school and on-the-job learning. Only in this way can integration on the labour market and competences be developed, which is important for achieving a competitive level in industry, as well as for developing the professional career of an individual. The social partners engage in modular and open training programmes. With the former presently being introduced according to new basics, the open part of the curriculum has been brought into line at the regional level and in the industrial branch to facilitate a faster response in schools to the requirements of companies, the environment and the labour market.

The employers' associations encouraged their members to focus on enhancing the competitive power of the companies by investing in the development of technology and modernisation of business processes as well as upgrading employees' knowledge so as to be able to adapt to new work challenges and technology more quickly. In designing salary policy in companies we are searching for new forms of remunerating the contributions by the employees in order to increase their satisfaction and establish a closer contact and bond with the company and its results, which certainly enhances the competitive power of companies. By introducing specific measures the employers encourage educational courses and vocational training and carry out the agreed programmes in regions.

The social partners continually strive for lifelong learning. In collective negotiations, education and vocational training are specifically emphasised as one of the motivation forms for successful work by employees. The principle of *learning company* is gaining in importance. The adult education and lifelong learning strategy has been adopted.

The partners' authority at the national level, Professional Council for Vocational and Professional Training, deals with the proposals regarding vocational standards, paying attention to new technologies and the competence approach.

The Vocational Training Centre, the social partners' authority, considers the needs of social partners when designing education and vocational training programmes. There were 70 national vocational qualifications prepared for different areas. When taking on employees, employers consider new vocational qualifications, especially where the legislation obliges them to do so.

Employers' organisations also implement courses and exams for master, foreman, manager of a small business. These are part of the education system.

The social partners informed their members about numerous novelties and possibilities in established means of communication as well as additional activities in their sphere: education of personnel, organising round tables, counselling, etc. The social partners made use of the funds provided also by the European fund for implementing the above-mentioned.

### **Actions taken at the sectoral level**

In general we can say that the actions taken at the national level were identical to the actions taken at the sectoral level.

With reference to the sectoral level we would like to point out actual conclusions in the following areas. The structural deficiencies are reflected above all in the deficit in the personnel in the area of engineering, catering and tourism, building and service providing. This encouraged initiatives and preparation of programmes for training the deficit personnel and preparation of the national vocational qualifications.

In addition to upgrading the professional knowledge, the social partners actively carried out various programmes of entrepreneurship training for the employed, young people and the unemployed with a view of improving competitive strength and business success.

### **Actions taken at the company level**

In individual SMEs and large enterprises the social partners introduced competence models, which follow the principles of the **lifelong learning** and the **learning company**. This applies both to large SMEs and large enterprises and medium and small enterprises and crafts.

There are a growing number of enterprises that apply for projects co-financed with EU funds, which results from training courses provided by the social partners.

**SMEs and large enterprises** started to link up with **the local and regional community** to negotiate about and perform joint actions such as tailor-made courses, establishing development centres and inter-company training centres, etc.

**The employers themselves try to ensure competent personnel through different forms of training, qualifications, pre-qualification** since, despite initiatives by the social partners, the school system still does not fully deliver. Enterprises invest considerable amounts of funds in ensuring professionally trained personnel.

## **Good practice examples**

- **Self-employed people in craft sector training funds.**

In 2004 more than 20,000 persons employed in SMEs participated in different forms of education and training co-financed by the funds. The number represents 40 per cent of people employed in the craft sector and 5 per cent of the total number of employees. Based on the agreement between the social partners in collective agreements these funds are financed by the employers in craft sector.

- **College programme Mehatronik**

It was established based on analysing the deficit in technical personnel in the industry in co-operation with the social partners. It is an inter-disciplinary programme in the field of electronics and mechanical engineering. The employers ensure jobs for carrying out practical training.

- **ESF – European Social Fund –**

The Employment Service of Slovenia issued an invitation for the SMEs and large enterprises to apply for co-financing from the ESF funds for training and educational courses for employees as well as for preventing potential unemployment. The employers' associations provided their members with information and assistance in the application procedure.

## Spain

### Sources of information

- Trade unions: CC.OO. (Trade Union Confederation of Workers Commissions); UGT (General Union of Workers), members of ETUC and Confederación de Cuadros (Managers Confederation) (member of CEC).
- Employers: CEOE (Confederation of Spanish employers), member of UNICE; CEPYME (Confederation of Spanish SMEs), member of UEAPME

### Introduction

Although the "framework of actions" has lost visibility in 2004, the four priorities remain at the centre of all the debates and developments of this field.

The main developments which have been dealt with the four priorities during 2004 were the following:

- Extension of the National Framework Agreement on Collective Bargaining, a reference for negotiators of collective agreements, which includes a specific reference to the "framework of actions."
- In July 2004 the most representative trade unions and employers' organisations (CC.OO., UGT, CEOE and CEPYME) signed with the new Government a joint Declaration to promote competitiveness, employment stability and social cohesion. This agreement contains the immediate social dialogue agenda, including a "shared analysis, along with the adaptations of an updated training model for employees, preserving participation of trade unions and employers' organisations and allowing the Regional Governments to take part in the system." The aim is to adapt the present model to the lifelong learning strategy.
- The National System of Qualifications anticipated in the Qualifications and Vocational Education and Training (VET) Act approved in 2002 continued to be developed throughout 2004.

### Actions taken at national level

- **to identify and anticipate competences and qualifications needs**

The development of the System of Qualifications anticipated in 2003 allowed the publication of the first 97 Qualifications of the National Catalogue. The identification of these professional profiles, with associated training modules, will facilitate the adaptation of various training offers (both initial and continuous training) and will allow the recognition of informal learning, as well. Currently, these jobs continue and it is foreseeable that between 2004 and 2005 the joint set of qualifications which will complete the Catalogue will be produced.

On the other hand, within the framework of continuous training (people in employment) the study on training actions that companies and sectors are planning has been developed. The study structures this set of training actions in a way that distinguishes those of a sectoral character and those of a horizontal character. This initiative aims to identify and to structure emerging needs.

- **to recognise and validate competences and qualifications**

The Qualifications and VET Act foresees the development of an accreditation procedure of formal and informal learning. It uses the qualifications established in the National Catalogue, as a reference. In 2004 some pilot experiments ended and they are supposed to be the first steps in making that recognition possible.

The new law on continuous training establishes procedures to promote training actions of modular character linked to the content of the National Qualifications Catalogue. This may help in the future for the accumulation and recognition of this learning.

- **to inform, support and provide guidance**

No significant progress was made in this field.

- **to mobilise resources**

Since 2004, the law on continuous training has allowed companies that invest in training to make deductions from social contributions, when they meet all requirements. Deductions from contributions are higher for SMEs and minimum finance for micro SMEs is guaranteed. Throughout 2005, within the framework of social dialogue, the effectiveness of these incentives to invest will be analysed, with special attention to the participation of small companies.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

The sectoral experts continue to collaborate in the sectoral working groups defining the National Qualifications Catalogue.

On the other hand, within the framework of continuous training activities, some Joint Sectoral Commissions for training that include the continuous training priorities in each field, included in the sectoral reference plans, there are some modules linked to the National Qualifications Catalogue: telemarketing, savings banks, health, textile and clothing industry, etc. The aim is to allow better recognition of continuous training in the framework of lifelong learning.

- **to inform, support and provide guidance**

Some sectoral employer and union organisations (hotels and restaurants, wood and furniture, building, etc.) developed, throughout 2003 and 2004, some specific information and orientation activities, such as workshops with teachers, vocational orientation guides, sectoral health and safety training modules, etc.

- **to mobilise resources**

In collective bargaining, some specific sectors agreed some additional investments on training, in addition to the compulsory social contributions.

#### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs**

Companies' activities on identification and development of competences, continue to offer interesting examples, of SMEs in some cases. Nevertheless, it is necessary to promote a more active attitude on the part of companies, especially of SMEs, in this field.

- **to inform, support and provide guidance**

Within the framework of continuous training, there are some actions foreseen in order to give support and advice to SMEs.

- **to mobilise resources**

Throughout the first year of experience with this system of incentives for training, and only until November 2004, almost 50,000 companies used these incentives via social contributions, which meant a financial credit of € 230,000,000 to support companies for investment in training.

## Sweden

### Sources of information

- Trade Unions: LO (Swedish Trade Union Confederation), TCO (Swedish Confederation of Professional Employees) and SACO (Swedish Confederation of Professional Associations), members of ETUC
- Employers: Swedish Enterprise (Confederation of Swedish Enterprise), member of UNICE; Företagarna (Federation of Private Enterprises), member of UEAPME; SFCC (Swedish Federation of County Councils), SALA (Swedish Association of Local Authorities), members of CEEP

### Actions taken at national level

- **to identify and anticipate competences and qualifications needs**

Studies aiming at identifying future competence needs were initiated by all organisations. The findings were used in dialogue with government and other organisers of education and training in order to influence the dimensioning, quality and contents of education and training. Results of importance for future development of private and public sector companies were highlighted in relation to members. Such initiatives were taken by the Confederation of Swedish Enterprises, the Federation of Private Enterprises, the Swedish Federation of County Councils, the Swedish Association of Local Authorities, the Confederation of Professional Employees and the Swedish Trade Union Confederation.

- **to recognise and validate competences and qualifications**

Validation of skills and competences was on the agenda of many organisations as a tool for making better use of available competences and as a tool to support individual career development and mobility. The new and temporary governmental authority, The Delegation for Validation, attracted much interest and support from labour market organisations.

- **to inform, support and provide guidance**

Activities to inform, support and provide guidance to employers and employees in their choices of learning traditionally are continuously being produced by all labour market organisations. More focus this year was on flexibility in learning, namely the need to tailor the content according to competencies already developed. Several organisations engaged in a governmental campaign for flexible learning aiming to highlight the many available possibilities for flexible learning. Databases on best practice on life long learning and training were developed, as for example "The Bank of Ideas" developed for county councils and local authorities.

- **to mobilise resources**

The social partners agree on that there are more resources to mobilise apart from financial ones, for example net-based learning. Many are engaged in projects aiming

at refining net-based education and training, realising that it permits more economical use of resources than previously: information is easily accessed; studies are facilitated for those living at a distance from schools and training institutions; and finally the combination of study and work is more feasible. Other examples are the agreement for "changeover" between the Confederation of Swedish Enterprise and the Swedish Trade Union Confederation, as well as the relocation of money from a trust fund carried out by the Confederation of Professional Employees.

### **Actions taken at sectoral level**

- **to identify and anticipate competences and qualifications needs**

Highlighting and communicating companies' competence needs and obstacles for recruiting are essential for organizations at sectoral level. Many initiatives were taken to improve dialogue and to develop cooperation between enterprises, regional colleges and universities, workers' organisations and other regional organisers of education and training. Private sector employers' federations initiated a study on enterprises' future needs for skills and competencies aiming at identifying overall trends. The Federation of Private Enterprises carried out a study and an action plan in order to promote cooperation between small enterprises, universities and regional colleges. Initiatives of the same character were initiated by SFCC /SALA in order to correctly dimension and design state financed training programs. Municipality Workers' Union initiated a project "Sustainable model for development of competencies" aiming at identifying learning needs. Financial Sector Union initiated an upper secondary and a university education in finances.

- **to recognise and validate competences and qualifications**

The possibility to validate competences and qualifications came into focus at sectoral level. Private employer federations initiated projects to disseminate possibilities in order to validate employable competence in various sectors of the labour market. The Swedish Locksmith's Association initiated a project focusing on criteria for validation of competence for locksmiths. SFCC/SALA and their members engaged in the development of methods for validation of real competence for teaching, care and health care at upper secondary and university level. The Non-manual Workers' Union developed an interactive tool for members to identify and organise existing competences and to identify competences that need to be developed through further studies. The Food Workers' Union initiated a lifelong-learning project focused on validation and skills development for employees in the food sector.

- **to inform, support and provide guidance**

Employer federations in all sectors performed projects in order to inform, support and provide guidance to students on future job possibilities. County councils and local authorities engaged in similar projects and produced brochures and information in guides. The Union of Civil Servants developed tools for work-place analyses of individuals' competence needs and career planning.

- **to mobilise resources**

Cooperation between different sectors of local society, labour market organisations and social partners, companies and workplaces, organisers of education and local authorities, is one of the most powerful forces to allocate resources and to focus needs in a region. LO-affiliates in Halland started a joint project aiming at pooling resources and strengths from many diverse players and joining all valuable forces for learning: unions, organisers of adult education and training, learning centres, municipalities and private organisers promoting competence development.

### **Actions taken at company level**

- **to identify and anticipate competences and qualifications needs'**

Anticipating and identifying competences needs are basic and essential at private and public company level. Means and tools for this are continuously being developed to support this work. Several companies have been engaged in the production of a guide for employers on how to make strategic analyses of competence needs at company level. Many local authorities are engaged in projects for competence analyses and competence development, for example "A better job" (including IVP). Companies in the ICT sector contributed to a survey by the Non-Manual Workers Union on the anticipated competences and qualifications needed in the ICT sector.

- **to recognise and validate competences and qualifications**

Validation came more in use as a tool when recruiting new employees - for example when identifying real competence in relation to job tasks – and as a tool to secure and value competence at the work-place.

- **to inform, support and provide guidance**

Personal development dialogues between managers and employees are performed continuously, more so in larger companies. Normally they are held once a year. Other tools for similar purposes are career coaching, work-rotation and job-exchanges.

- **to mobilise resources**

Closer cooperation gradually emerged between research centres, universities, advanced secondary education and other educational organisers as well as private and public companies. ICT-based learning became more used in all sectors of the labour market.

### **Good practice example**

The society Centre for Competence, TEK, was founded in Halmstad in 1996 to support technical vocational training at upper secondary school, to contribute to teachers' in-service training and to support member companies and their employees in developing their competencies. Today TEK has more than 270 member companies, enterprises as well as local authorities, big and small. Notably the

different players, the municipality, the school, companies, white- and blue-collar unions, have been able to focus their efforts towards a joint goal, combining different policy areas of life long learning.

TEK's members contribute to the creation of a modern technical centre within the upper secondary school. The financial surplus from the society's activities is invested in machines and other technical equipment to be used free of charge in the vocational training. All members are able to influence TEK's range of courses and alignment and they have access to all courses, seminars, breakfast meetings and networks at a reduced price. Recently, the society started a trust fund open for member companies interested in arranging company based accounts for competence development.

## The United Kingdom

### Sources of information

- Trade unions: TUC (Trade Union Congress), member of ETUC
- Employers: CBI (Confederation of British Industry) member of UNICE; FPB (Forum of Private Business), member of UEAPME; the UK section of CEEP

### Introduction

The UK economy has performed well in 2004. Although output growth slowed in the third quarter, this came after a strong first half year. The economy has been operating at or above normal capacity and there has been little slack in the labour market – unemployment is at a 29-year low. Employment growth has been strongest in construction and public services. The social partners' priority in 2004 has been to continue to work effectively with Government to drive forward the Skills Strategy reforms, to better meet the skills and training needs of employers and individuals.

### Actions taken at national level

Employers and unions have continued to play a central role in driving forward the reforms outlined the Skills Strategy. The CBI, UNICE's UK member, and the TUC, ETUC's UK member, as part of the Skills Alliance, have worked with Government to develop a targets framework to focus reform – with the overarching aim to attain greater labour market capacity and higher productivity and business performance and ensure individuals have the skills they need for employment, progression and personal development. The key challenges for employers, unions, employees, Government and education and training providers were agreed as:

- progress towards full employment and increase the employability of adults
- improve employee competence and achievement of qualifications at all levels
- raise demand for skills as part of improving innovation and business performance
- improve effective use and acquisition of skills by employers and employees at all levels.

As part of the drive to meet these objectives, the social partners are involved with a review and reform of England's national qualifications framework with the aim of rationalising the number of vocational qualifications and ensuring that they are all fit-for-purpose. The main area of reform will be establishing a system of units and credits to aid both horizontal and vertical progression for learners and to ensure training and qualifications relate more directly to the business need.

Much of the implementation of the Skills Strategy at regional level will be the responsibility of new Regional Skills Partnerships. The social partners have been closely involved in their establishment and both the TUC and CBI are represented on a national steering group taking forward this policy development.

The social partners have continued to have involvement with the Employer Training Pilots programme – offering free training in basic and level 2 skills for those with no or low qualifications – and the development of a national scheme based on the pilots. To date, around 14,500 employers and 100,000 learners have already signed up. Seventy percent of firms involved employ less than 50 staff.

The social partners, as members of the national Apprenticeship Taskforce, were involved in the relaunch of the apprenticeships programme aimed at improving the take-up amongst employers and improve the experience of apprentices. Key developments include increased involvement by Sector Skills Councils (SSCs) in apprenticeship frameworks and the piloting of young apprenticeships for 14-16 year olds. The TUC have produced a joint publication with the LSC explaining the new programmes and encouraging union representatives to promote apprenticeships to their employers to increase take-up and improve quality by supporting apprentices.

The social partners were consulted on the Tomlinson Working Group's proposals on the reform of curriculum and qualifications for 14-19 year olds, which includes recommendations on increased integration of vocational education into the school curriculum. The social partners are in the process of lobbying Government on implementation details in its forthcoming white paper.

The FPB, UEAPME's UK member, is on the Technical Steering Group of CoVEs (Centres for Vocational Excellence) and assisted in the arrangement of a pilot 'Information Dissemination' meeting in St. Helens in June 2004.

### **Actions taken at sectoral level**

To date, a total of 20 SSCs have been licensed and social partners have remained closely involved. SSCs are tasked with drawing up occupational standards for their sector that will feed into the national reform of qualifications. The Government expects each SSC to draw up a Sector Skills Agreement, in which employers and unions identify skills and productivity needs in their sector and the necessary actions to meet those needs. Four SSCs will launch the first Agreements in early 2005.

In the summer of 2004, a 3-year pay deal was signed for local authorities in England and Wales, which includes an agreed framework on training and development. It calls upon local authorities to develop local 'Workforce Development Plans' linked to their service delivery plans and strategic objectives. Training and development provision should be shaped to local requirements and take account of the full range of learning methods, allowing access to learning for all employees. Employees attending required and agreed training are entitled their normal earnings and payment of fees and other expenses arising. Authorities are asked to establish local partnership arrangements, including recognised unions, to develop workforce development plans.

### **Actions taken at company level**

The social partners were closely involved in reviewing and relaunching the Investors in People (IiP) standard to ensure it continues to be relevant to business and

encourage employers to recognise the business benefits of investing in and developing employees, particularly small employers. To date, 37,035 organisations have achieved iP recognition, and a further 24,220 are committed to achieving the standard – covering almost 40% of the workforce. The CBI and TUC have also given support to a new iP guide for employers, promoting the need for all employees to have the necessary Skills for Life to access company learning and development.

The CBI has recently completed a project examining employers collaborating on skills and training within supply chains and clusters. Based on an employer survey and good practice case studies in all sectors, the report makes recommendations to Government and other stakeholders to ensure good practice is spread widely.

There are currently over 8,000 Union Learning Representatives opening up access to learning for thousands of workers around the country, in line with the Government target of getting 22,000 reps in place by 2010. In the last year alone, over 60,000 people have benefited from learning through unions. A recent TUC survey indicates that around 50% of ULRs have negotiated learning agreements with their employer.

### **Good practice examples**

- **Andrew Collinge**

Andrew Collinge (AC) is a Liverpool-based hairdressing firm, with eight salons and four training centres. The company trains 200 apprentices, of whom 150 are from other hairdressers in the region. AC training received an excellent rating for the quality of its training and has recently been awarded Learning and Skills Beacon status. AC arranges for the young person to have day release from their employment for the off-the-job training requirements, which are fully integrated with salon activities. The apprentice does real hairdressing work on customers, enabling the young person to assemble evidence of competence in nine separate NVQ units. Employer contracts are agreed with all salons employing AC apprentices and serve to improve the quality of hairdressing in Merseyside by insisting on minimum standards and encouraging employers to take an interest in the young person's development.

- **Graphical, Print and Media Sector, Amicus**

The positive role unions can play in promoting Apprenticeships has been demonstrated by the GPM Sector, Amicus in the South West of England through the Union Learning Fund Sight project. Union reps have been successful in encouraging seven predominantly small and medium employers in the printing industry to take on 19 apprentices. Union reps have negotiated with employers to take on apprentices, ensuring that they have employed status and good wages and conditions. Flexible provision arrangements have been set up, which has overcome a big barrier to training in the semi-rural South West, where there are only 3 print colleges. With the support of Train the Trainer courses, reps have also taken on roles as mentors, trainers and even assessors to give the young people support and advice.

Retention of apprentices is around 90%, with two apprentices winning the regional Apprentice of the Year award. A national ULF project has recently started, and the success of Sight is now being built upon in the South West and other regions.

- **North Essex Mental Health Partnership**

North Essex Mental Health Partnership has been recognised for the iIP Standard and offers a comprehensive induction programme, annual appraisals which provide each member of staff with a Personal Development Portfolio and access to the Trust's internal training centre. In order to address the training needs of management staff, the Trust has recently carried out a second Management and Leadership Needs Survey to specifically address the needs of middle level managers. The first survey led to the introduction of the Trust's Team Leader Essential Training package, which will now be followed by Team Leaders Essential Plus. An external evaluation of the Trust's Training plan has recently been commissioned.

- **St Cuthbert's Catholic Community High School, St Helens**

This is an excellent example of the benefits to be gained from the development of an Enterprise Pathfinder school that combines support from local businesses, investment by big business and guidance from publicly-funded advisers. The school has utilised surplus campus building to develop a hotel, a catering function, to serve both the school and the community, and a fitness centre that combines the school gym with public facilities. These enterprises are overseen by committees of pupils who have gained first hand experience of commercial management. As a direct result of the proactive involvement of pupils in the community and their better understanding of social interaction, the school believes that exam results have improved substantially.

## The European level

### Introduction

The framework of actions was adopted in March 2002 by the European social partners at inter-professional level. Member organisations of UNICE/UEAPME, CEEP and ETUC committed themselves to promote the framework of actions in the Member States at all the appropriate levels. Subsequently, follow-up actions have been taken primarily in the Member States. However, some actions can also be reported at European level.

### Actions taken at European cross-industry level

The European social partners continued to actively disseminate the framework of actions in 2004. They participated in numerous conferences, workshops and meetings involving training providers, policy-makers and national social partners to explain the objectives of the framework of actions adopted in 2002, disseminate the good practices described in the follow-up reports 2003 and 2004 and more generally discuss ways of promoting competence development in Europe.

A special seminar was organised by the European social partners in May 2004, with the aim to informing and fully involving social partners from the new Member States in the follow-up process. Participants discussed the framework of actions, its content and rationale, and shared good practice examples of follow-up in different member states.

European social partners also had opportunities for discussing with the European Institutions and to identify crucial elements for the successful implementation of the Lisbon strategy at European and national levels. Concerning in particular education and training policies, European social partners continued to meet on a regular basis the troika of the Education Council to exchange views on the priority reforms of education and training systems. European and national social partners were also involved in the review process of the European policy on vocational training that led to the adoption of the so-called Maastricht communiqué on 14 December 2004. Through their involvement, they managed to draw greater attention to the priorities of the framework of actions in the Maastricht communiqué, thereby demonstrating the need to reinforce social dialogue on the crucial issue of competence development.

Among more specific projects, the following examples can be given:

- ETUC, UNICE/UEAPME and CEEP launched the second phase of their joint project to help national social partner organisations in the new member states to get fully involved in the European social dialogue. In this context, the framework of actions adopted in 2002 and the implication of its promotion by social partners in each national context is discussed.

- ETUC, UNICE/UEAPME and CEEP participated in the Conference organised by the European Commission and the Dutch presidency on 5 and 6 October 2004 on European sectoral initiatives on competences and qualifications, which aimed at exchanging information on solutions developed at sector level in Europe, some of them being developed in the framework of the sectoral social dialogue.
- CEEP organised an internal awareness-raising seminar, vis-à-vis its national sections and members, in particular from the new Member States, on the content of the framework of actions and the way to follow it up. This seminar was co-chaired by the general secretary and the social affairs committee and took place in Brussels on 28 September 2004.

Moreover, CEEP is, together with some of its national members, co-partners of a project financed by the European Social Fund which aims to better utilise the competences of senior workers (55+) in the public sector, in particular by giving them the opportunity to transfer their knowledge and competences to youngsters.

### **Actions taken at European sectoral level**

- In 2004, CEEMET (the Council of European Employers for the Metal , Engineering and Technology-based industries) and the EMF (the European Metalworkers' Federation) have published the report of their joint Conference organised on 30 September & 1 October 2003 on "Skills shortages in the metal industry". The conference focused on two major themes: "the image of the sector" and "new ways to deliver training, including e-learning". CEEMET and EMF will further develop their work on this issue in 2005.
- Lifelong learning has been the central theme of the work programme of the Sectoral Social Dialogue "Insurance" since 2002. That same year, a study was undertaken on the adequacy of the supply of and demand for training within the European insurance area. On 26 February 2003, they sent the European Commission a letter in which they express their satisfaction concerning the contents of the study since it is fully in line with the reflections and concerns linked to lifelong learning.

Based on the content of the study, the sectoral social partners CEA (Comité européen des assurances) and UNI-Europa are currently working on a joint declaration on lifelong learning in the insurance sector. The draft joint declaration takes account of the four priorities identified at European cross-industry level in the framework of actions.

- The European Construction Industry Federation (FIEC) and the European Woodworkers' and Building Workers' Federation (EFBWW) have undertaken two major projects in 2004.

First, the sectoral social partners have developed a brochure in favour of the employment of young people and ageing workers in the sector, with the financial support of the European Commission (Leonardo programme). The departure of a significant number of young people after just a few years working in the sector represents a serious waste of resources to the various vocational training

systems. It means that there is a correspondingly low return on businesses' investments in human resources, and a consequential loss of both skills and finances for the sector. The departure of many experienced workers aged over 50 is also a problem in many countries. To meet these challenges, the construction sector's European Social Partners have promoted a solution: tutorship, that is to say the establishment of a preferential and structured relationship between an older and experienced worker, the "tutor" and a young worker, or newcomer in the firm. The Social Partners have published a brochure to assist construction companies to develop their tutorship systems, developed a training module to train the tutors, as well as additional tools exclusively dedicated to the tutor and the young person, such as interview assessment scales and notebooks. More information is available on the FIEC website at [www.fiec.org](http://www.fiec.org).

Secondly, FIEC and EFBWW launched in March 2002 a joint pilot project on the transparency of qualifications with a view to encouraging the mobility of workers within the Union. The aim of this project is to develop a "transparent" document which would clearly and intelligently specify workers' qualifications so that these can be recognised in EU countries other than the workers' own countries of origin. The project is initially limited to one trade within the sector: bricklayers. A working group has been given the task of comparing the qualifications which bricklayers are expected to hold in the various EU countries. It will also examine certain initiatives which have already been taken at national level. These go from cards showing qualifications to data banks listing the skills required by the various trades in the sector. The working group has also been asked to propose systems which will allow an increase in the recognition of these trades within the EU, possibly taking its inspiration from the Europass developed by the European Commission. The possibility of extending the project to other branches of the construction sector is examined.

- In June 2001, the European social partners in the banking sector (FBE, GECE, GEBC and UNI-EUROPA) decided to include lifelong learning in their work programme for 2002. Further to a study carried out by the joint working group, which collated information submitted by affiliates in eighteen countries, a joint statement on the subject was approved in early December 2002.

The statement, which makes specific reference to the European framework of actions, considers four questions identified by the working group:

- definition of various levels of vocational skills;
- recognition and validation of competences ;
- information and guidance;
- employment and vocational retraining.

Some priorities have also been defined, notably:

- on development of qualifications: priority is given to young people, workers who do not have the skills required for new working methods and management by each employee of his career and employability;
- recognition and validation of competences: each employee must be encouraged to develop his competences throughout his working life and each company must be encouraged to ensure better identification and management of competences. Cases of good practice are described to illustrate this priority;

- information and guidance: companies, employees and social partners must share rights and responsibilities regarding each employee's competence development and training;
- employment and vocational retraining: the possibilities for continuing competence development must be widened to include all employees, regardless of their position or contractual status.

The joint declaration on lifelong learning has been signed by the social partners in order to give some general guidelines to the European banking sector leaving companies at national level free to choose the best self-tailored practice.

## Annex I – List of contact persons

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## Annex II

**European Trade Union Confederation\***  
**Union of Industrial and Employers' Confederations of Europe –**  
**UNICE/UEAPME\*\***  
**European Centre of Enterprises with Public Participation and**  
**of Enterprises of General Economic Interest**

14 March 2002

**« FRAMEWORK OF ACTIONS FOR THE LIFELONG DEVELOPMENT OF  
COMPETENCIES AND QUALIFICATIONS »**

### I./ CHALLENGES

1. The 21<sup>st</sup> century is beginning with changes, the extent of which it is difficult to assess at present for enterprises and employees, as well as for society as a whole.
2. New information and communication technologies represent one factor in speeding up trade flows. Markets globalise and simultaneously segment in order to retain increasingly mobile customers. Businesses will have to adapt their structures more and more quickly in order to remain competitive. The intensive use of teamwork, flattening of hierarchies, devolved responsibilities, as well as greater multi-tasking are leading to the growth of learning organisations. This contrasts with the Taylorist work organisations, which still operate in a number of enterprises in Europe. Public service enterprises are confronted with the same challenges.
3. The ability of organisations to identify key competencies, to mobilise them quickly, to recognise them and to encourage their development for all employees, represents the basis for new competitive strategies. This allows enterprises to keep in line with customer expectations and employees to improve their employability and career prospects.
4. In the context of technological developments and of diversification of work relations and organisations, employees are confronted with greater mobility, internal and external to the enterprise, geographical and occupational, and to the need to maintain and improve competencies and qualifications levels.
5. Against this background of rapid pace of change, the social partners at European level affirm the development of competencies and the acquisition of qualifications as major challenges of lifelong learning.

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\* The ETUC delegation includes representatives of the Eurocadres/CEC Liaison Committee

\*\* UEAPME - European Association of Craft, Small and Medium-Sized Enterprises

6. The ageing population and the social expectations, which have resulted from higher levels of education of younger generations require a new way of approaching learning systems, ensuring that there are opportunities for all age groups – both women and men, skilled and unskilled – if significant increases in competencies and qualifications levels are to be achieved. Lifelong learning contributes to the development of an inclusive society and the promotion of equal opportunities.

## **II./ SOCIAL PARTNERS' APPROACH**

7. Whilst lifelong learning encompasses all learning activity undertaken throughout life, the focus of this initiative by the European social partners is to:

- make an effective and specific contribution to the realisation of lifelong learning in the context of the strategic objectives established at the European Councils of Lisbon and Feira on employment, social cohesion and competitiveness;
- give impetus so that the development of competencies and the acquisition of qualifications are perceived as a shared interest by both enterprises and employees in each Member State;
- affirm the joint responsibility of social partners at all levels with regard to competencies development and promote their cooperation;
- acknowledge the broader dimension of the challenge, which calls for a close concertation with public authorities as well as education and training institutions at all levels.

8. In addition to social dialogue, the success of this initiative depends on:

- each enterprise making the development of its employees' competencies crucial for its success;
- each employee making her/his own competencies development crucial for the management of her/his working life;
- the State and local communities fostering learning opportunities in the interest of competitiveness and social cohesion.

9. The social partners call for the creation, within the institutional framework of each Member State, of conditions, which will further encourage the concerted development of competencies and qualifications, in addition to existing unilateral approaches to learning.

10. The lifelong development of competencies depends on the existence of a solid foundation<sup>7</sup>, with which individuals are equipped during their initial education.

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<sup>7</sup> The following elements have been identified as forming part of the solid foundation: reading, writing, numeracy and at least a second language, problem-solving ability, creativity and teamwork, computing skills, ability to communicate, including in a multi-cultural context, and the ability to learn how to learn, etc.

11. This solid foundation should be jointly defined and updated by the national education systems and the social partners. It is necessary to reflect further on the subject, in order to specify the content and the conditions needed for each young person to obtain this solid foundation. The social partners must be associated with this reflection.

### **III./ DEFINITIONS**

12. For the purpose of this initiative,

- “Competencies” are the knowledge, skills and know-how applied and mastered in a given work situation;
- “Qualifications” are a formal expression of the vocational or professional abilities of the employee. They are recognised at the national or sectoral level.

### **IV./ FOUR PRIORITIES**

13. The social partners assert the principle of shared responsibility of players with regard to four priorities and call for the intensification of dialogue and partnership at the appropriate levels. The social partners believe that the lifelong development of competencies depends on the implementation of the following four priorities:

- identification and anticipation of competencies and qualifications needs;
- recognition and validation of competencies and qualifications;
- information, support and guidance;
- resources.

#### **1. IDENTIFY AND ANTICIPATE THE COMPETENCIES AND THE QUALIFICATIONS NEEDED**

14. Identifying competencies and qualifications needs and anticipating their development represents a complex task given the numerous socio-economic factors, which must be taken into consideration, but it is imperative nevertheless. The social partners regard this identification and anticipation as taking place at two levels:

##### The enterprise level:

15. Identification of competencies at enterprise level must become a main axis of human resources policies covering all employees in enterprises and an issue for in-depth social dialogue:

- responsibility lies at the highest managerial level for deciding the overall competencies development plan necessary for the success of a company’s business strategy;

- defining and answering competencies needs require the joint involvement of employers and employees;
- individual competencies development plans jointly elaborated by the employer and the employee are important to foster joint efforts to develop the employee's competencies;
- developing a learning environment is also important for success; professionals and managers play a crucial role in this respect.

The national and/or sectoral level:

16. The collective analysis of competencies needs and of the development of vocational or professional qualifications is a priority in relation to what is at stake for:

- young people in the context of their career guidance and integration into working life;
- employees in the management of their careers and their capacity to remain in employment;
- job-seekers, in view of the developments on the labour market;
- companies, in terms of their competitiveness.

17. In order to put this identification and anticipation into practice, the European social partners consider it necessary to:

- work in partnerships with education and training providers at all levels;
- develop networks to collect information and exchange experiences, including by making effective use of existing European instruments such as the European monitoring centre for change or Cedefop.

## **2. RECOGNISE AND VALIDATE COMPETENCIES AND QUALIFICATIONS**

18. The European social partners regard the recognition and validation of competencies as essential, in order that:

- each employee is aware of and encouraged to develop her/his competencies in the course of her/his occupational life;
- each enterprise has the tools to better identify and manage the competencies in the company.

19. The social partners consider it necessary to deepen dialogue with the aim of improving transparency and transferability, both for the employee and for the enterprise, in order to facilitate geographical and occupational mobility and to increase the efficiency of labour markets:

- by promoting the development of means of recognition and validation of competencies;

- by providing a system for transferable qualifications;
- by identifying the possible links and complementarities with recognised diplomas.

20. At European level, social partners will contribute to on going discussions on transparency and recognition of competencies and qualifications.

### **3. INFORMING, SUPPORTING AND PROVIDING GUIDANCE**

21. In order that both employees and enterprises can pursue a strategy for competencies development, it is necessary:

- to enable each employee and each enterprise to access all the necessary information and advice;
- to provide SMEs with suitable information and to assist their managers through the creation of customised support.

With this aim in mind, the social partners call for:

- the development of facilities allowing employees and enterprises to be supported in their choices of learning, and to tailor the content according to competencies they have already developed, for example through a one-stop-shop facility in Member States, including a database on lifelong learning possibilities and opportunities for career evaluation;
- these facilities to be easily accessible and relevant with regard to labour market developments.

22. To promote a lifelong learning culture, both trade union and employer organisations have a key role to play in informing, supporting and advising their members and need to develop in house expertise to perform this role.

### **4. MOBILISING RESOURCES**

23. Mobilising resources for the lifelong development of competencies is a key question, which cannot be regarded as depending exclusively on social partners. Other players have also an important role, notably:

- public authorities in order to promote labour market integration;
- the enterprise in order to develop its key competencies;
- the employee in order to play a part in her/his own development.

All players (enterprises, employees, public authorities, social partners) need to seek new and diversified sources of financing.

24. As regards the social partners, they consider the lifelong development of competencies as a priority and assert the principle of shared responsibility for mobilising and optimising resources. The social partners want to promote co-

investment and to encourage new ways of resourcing lifelong learning, through the effective and creative management of funding, time and human resources.

25. They call upon the whole range of players in this effort and advocate that it should operate in the following directions:

- to promote exchanges between national social partners and public authorities within Member States, with the aim of ensuring that the taxation of enterprises and individuals encourages investment in competencies development activities;
- to direct the use of structural funds, and particularly the European Social Fund, towards giving a stronger encouragement to social partners to develop initiatives and innovations.

#### **V./ ACTIONS AND FOLLOW-UP**

26. The member organisations of UNICE/UEAPME, CEEP and ETUC<sup>8</sup> will promote this framework in Member States at all appropriate levels taking account of national practices. Meetings can be organised at national level for presentation of this document. Given the interest of the matter under consideration, the social partners also decide to transmit this document to all interested players at European and national levels.

27. The social partners will draw up an annual report on the national actions carried out on the four priorities identified.

28. After three annual reports, the social partners will evaluate the impact on both companies and workers. This evaluation can lead to an update of the priorities identified. The ad hoc group on Education and Training will be entrusted with this evaluation, which will be presented in March 2006.

29. When preparing the structured work programme of the social dialogue, the social partners will take account of this framework of actions.

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<sup>8</sup> The ETUC delegation includes representatives of the Eurocadres/CEC Liaison Committee