

European employers’ sectoral coordination – 2023 EU level survey on sectoral social dialogue and capacity building

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Key findings¹

This report summarises the results of the survey undertaken in the period July-October 2023 amongst the European sectoral employers’ organisations. In this survey, the most recent information was collected from 17 Secretariats about the latest sectoral social dialogue processes and their capacity building needs. The survey was undertaken in the context of the EU funded project on sectoral employers’ coordination, implemented by BusinessEurope, SGI Europe and SMEunited. The key findings from the survey are summarised below.

The developments in the sectoral European social dialogue structures

The period since December 2022 was a busy time in the European Sectoral Social Dialogue Committees (ESSDCs). The survey results show a rich landscape of the outcomes reported by the Secretariats in their respective ESSDCs, demonstrating an active participation and joint actions with their social partners. The common trend across the sectors was the prevalence of joint opinions, positions, statements and declarations, followed by social partners’ contributions to the EU policies, indicating an important joint work towards the EU institutions. A key achievement in the respective ESSDCs since December 2022 was the signing of agreements or framework of actions, which was reported in several sectors (for example, in the live performance and railways sectors).

As highlighted in this report, there are a number of **common horizontal priorities** on which many Secretariats have worked recently in their respective ESSDCs. The common themes

¹ The report was written in November 2023 by the independent researcher Inga Pavlovaite. When quoting, please use Pavlovaite, I. (2024). European employers’ sectoral coordination – 2023 EU level survey on sectoral social dialogue and capacity building, Report.

across the ESSDCs are: joint social partners' responses to skills, digitalisation, sectoral transformation and EU regulatory initiatives.

When asked about their views on existing challenges in developing their respective ESSDCs, the Secretariats were almost equally split on this issue. They referred to the administrative challenges in organising meetings, the lack of logistical support from the European Commission for the exchanges, the suggested online meeting tools not being suitable for interactive discussions, the restriction to one in-person meeting per year and the lack of sufficient support in providing translation services.

The core policy priorities in the ESSDCs are shared across many sectors. Secretariats see the need to act on their members' priorities when shaping their ESSDCs. Furthermore, sectors tend to have common issues, such as reskilling/upskilling, addressing working conditions and labour shortages, responding to digitalisation and greening challenges. For several Secretariats, responding to the EU regulatory changes is a key priority in their ESSDCs.

When asked whether they experienced tensions or conflicts with their social partner on any important policy priorities, **the majority Secretariats did report such tensions.** Several Secretariats reported challenges specific to their sector. At the same time, several topics were identified on which disagreement is common across sectors - how to deal with labour shortages (including the issue of migration), how to agree on provisions on working time, and how to reflect the new forms of employment in the social dialogue processes.

Importantly, the majority of Secretariats also reported that new policy priorities have emerged recently which would require them adding to the next ESSDC work programme. **The key one across several sectors was labour migration to address skills and labour shortages.** In the national sectoral survey on collective bargaining practices, 13 organisations indicated that the sectoral collective bargaining agreements negotiated in the survey period also included the issue of skills. The agreements did not include provisions related to migration. The main common themes in the national sectoral collective bargaining agreements on skills relate to: provisions for trainees and apprentices, defining the time for training, specifying the training contents and planning the training.

Several EU initiatives also appear to provide an impetus for new actions and initiatives by the EU sectoral social partners. Although this question was not explicitly asked in the survey, several Secretariats provided examples of how this has been recently happening. The European Year of Skills (EYS) stimulated new actions or identification of skills priorities, as reported in the education, temporary agency work, hospitality and tourism, hospital and healthcare, and metal, engineering and technology-based sectors. For example, in the temporary agency sector, WEC-Europe and UNI-Europa negotiated joint recommendations on the European Year of Skills., whereas CEEMET organised a joint event in the framework of the EYS, namely "Social partners in action for skills in the metal, engineering and technology based industries" on 5 June 2023.

Sectoral actions were also inspired by the European Pact for Skills, reported in health, commerce, hospitality and tourism, and metal, engineering and technology-based sectors. For instance, in the health sector, the Secretariat reported providing input to the project under the Pact for Skills. in addition, Eurocommerce, reported on the Retail Pact for Skills developed and signed in November 2022 with UNI Europa. The Skills Partnership identifies the importance of upskilling and reskilling of the workforce. Furthermore, the European Alliance for Apprenticeships stimulated new actions as reported by the Secretariats in the sectors of commerce, construction, hospitality and tourism, chemical and metal, engineering and

technology-based sectors. For example, Ceemet and industriAll Europe are members of the European Alliance for Apprenticeships since June 2018, where in July 2021 the MET sectoral social partners renewed their pledge with new commitments for apprenticeships schemes. Similarly, the European Chemical Employers Group (ECEG), alongside its social partner, industriAll Europe are members of the European Alliance for Apprenticeships since 2015. Also, the EU transition pathways inspired further action as reported by three Secretariats in the metal, chemical and retail sectors. In particular, CEEMET is jointly responsible for the social dimension of the transition pathway for the mobility ecosystem. Recently, a thematic roundtable was organised on the social dimension of the transition pathway for the mobility ecosystem (Ceemet and industriAll Europe co-chaired this thematic roundtable together with the Commission). ECEG together with industriAll Europe and other stakeholders were co-creators of the Transition pathway for the chemical industry which was published in January 2023. Chemical social partners drafted two chapters, covering social and skills dimensions.

In terms of key strategic priorities going forward and expectations/strategies for the sectoral social dialogue in the (near) future, a common priority is to ensure that the future ESSDC work programmes reflect appropriately the core mutual concerns for social partners on both sides. In terms of more concrete strategic priorities, a number of common themes were identified as follows:

- Building the capacity of national members to participate in the national and European social dialogue structures and national collective bargaining processes;
- Promotion of upskilling and reskilling of the workforce in the respective sectors;
- Ensuring that the workforce is fit for upcoming challenges and transformations.

Joint activities with the respective social partners

The majority of the Secretariats reported on running joint projects with their social partners within the timeframe covered by the survey. This information allows to identify several common topics on which the social partners are working on in several sectors. This includes ongoing joint projects with their social partners related to the **forward planning and strategic anticipation of sectoral trends**, to **capacity building of social partners in the sectors** at the national level and **specific joint projects on digitalisation**.

Looking ahead, a number of Secretariats also reported planning future joint activities with their social partner. The key **common topics for such activities relate to skills, health and safety topics**.

Priorities for the capacity building of sectoral employers' organisations

When considering their own organisations as sectoral employers representing the interests of national members, many organisations highlight the crucial need for robust **administrative, logistical and financial support from the European Commission. This support is essential** to maintain a strong dialogue with the trade union counterparts.

This includes a range of aspects, including meetings' organisation, minutes and reimbursement of travel, as well as interpretation to multiple languages, and translation of social dialogue outcomes (joint declarations, statements, reports, etc.).

Several Secretariats also referred to the need for **a good level of funding** to ensure smooth implementation of projects with their social partner, as well as an easy access to the EU funded projects for the capacity building. The latter was identified by several sectors in relation to **capacity building of national members, especially in the eastern and central European Member States**. This was reported in the construction sector, as well as in the temporary

agency work, chemicals and healthcare sectors (and specific capacity building projects for the members are currently implemented in the construction, live performance and temporary agency work sectors).

Furthermore, the views expressed show **a common ground between the Secretariats, with the most identifying different organisational needs as very important**– including maintaining the membership base, expanding the services to the members, providing a range of supporting services to the members and evolving internal structures to respond to the needs of the members.

Next, the views of the Secretariats **on the capacity building needs in relation to their participation in the social dialogue process** show that the majority see the following needs as most important: to ensure active participation of their members in the European sectoral social dialogue activities, to maintain structures for social dialogue on the most important sectoral policy priorities and to ensure sufficient human resources in the organisation to engage in social dialogue activities at EU level.

Looking at the needs of national members of the European sectoral employers, there is a consensus between the Secretariats on their top priorities. The majority of respondents identified two key needs:

- 1) provide / diversify / expand support, training, counselling, information and communication to the members,
- 2) hiring new staff and training existing staff.

The other priorities were rated as comparatively less important, including strengthening the membership base of the employers' organisations and adapting internal organisational structures and work practices to respond to the needs of their members / new sectoral policy priorities.

The majority of the Secretariats also share key priorities including developing social dialogue structures and ensuring sufficient human and financial capacity of the members to participate in the social dialogue both at the national and at the EU levels. The Secretariats also concur on the priorities such as amplifying their voice in the policymaking processes of the Member States' and advocating for a legislative and political framework that fosters more opportunities for collective bargaining within their respective sectors. This underscores the significance of prioritizing these issues for further attention and follow up in the subsequent phase of the national sectoral survey.

In terms of the main policy priorities within their respective sectors, the Secretariats have identified two additional key top priorities: the **reskilling and upskilling of the workers and addressing labour shortages** in their sectors.

Regarding the use of funding for capacity building, the majority of Secretariats utilize various avenues of support to address organisational needs. the primary sources for most sectors are their own budgets and external funding from the European Economic and Social Development (EESD) and/or European Social Fund Plus (ESF+) programmes. However, opinions on whether current avenues of support are sufficient for capacity building vary among the Secretariats.

Specifically, when asked about their experiences with ESF+ funding for capacity building, Secretariats identified several challenges. Firstly, the funds are **not sufficiently known at the national level**. Secondly, there are **difficulties in applying for and managing such projects**

due to the necessary human resources and administrative burden associated with ESF+. Consequently, both interest in and the utilisation of ESF+ funding by sectoral employers' organisations remain limited.

However, some concrete experiences were reported in the live performance sector, where national members often benefit from ESF + through cooperation with other linked organisation, such as social funds. In such cases, national members utilize ESF+ funding for research, studies, set up of certain funds or training support in specific areas.

Introduction

This report summarises the results of the survey undertaken during the period of July-October 2023 amongst the European sectoral employer organisations. In this survey, the most recent information was collected from the EU sectoral employers' organisations Secretariats about the latest sectoral social dialogue developments and their capacity building needs. The survey was undertaken in the context of the EU funded project on sectoral employers' coordination, by BusinessEurope, SGI Europe and SMEunited.

All information provided in the survey was treated as in principle non-confidential so that it can be used for the report. The timeframe covered in the information collection was from December 2022 until June 2023 (as we started collecting data in July 2023). The information covers EU-27 Member States, including Norway and Iceland (the report does not cover non-EU/EEA countries).

The survey was completed by 17 Secretariats, from the following organisations covering a range of sectors.

Table 1: Overview of EU survey respondents

Sector	Secretariats of European sectoral employer organisations
Education and Training	European Federation of Education Employers
Construction	FIEC - European Construction Industry Federation
Temporary Agency Work	World Employment Confederation-Europe
HORECA	HOTREC
Local and Regional Governments	CEMR
Railway	CER - Community of European Railway & Infrastructure Companies
Private Security Services	CoESS
Industrial Cleaning	EFCI
Metal, engineering and technology based industries	Ceemet
Banking Sector	European Banking Federation
Construction	European Builders Confederation EBC
Live Performance	Pearle*-Live Performance Europe
Chemical, pharmaceutical, plastic and rubber ²	European Chemical Employers Group (ECEG)
Hospital and Healthcare sector	HOSPEEM - European Hospital and Healthcare Employers' Association
Service for relations with the regulator, state authorities and international cooperation	Post Montenegro
Postal sector	CTT - Correios de Portugal
Commerce	Eurocommerce

The main survey results are analysed below, structured as follows:

- Section 1.1: outcomes of the European sectoral social dialogue since 2022 in the sectors represented by the Secretariats;
- Section 1.2: current policy priorities in the-ESSDCs;
- Section 1.3: joint activities with the social partners;
- Section 1.4: priorities in the capacity building of the social partners.

² For convenience, hereafter the report refers to the chemical sector in general, while covering also the pharmaceutical, plastic and rubber industry. The 4 sectors are indeed all represented by the ECEG and covered by the same European sectoral social dialogue committee.

The focus of the analysis is to identify common trends and differences between the sectors and views of the Secretariats, rather than to summarise the information for each individual sector and Secretariat. Hence, the analysis does not show the situation in each sector, rather aims to portray general trends and overall views, to support the exchange of information, coordination and joint working amongst the different Secretariats.

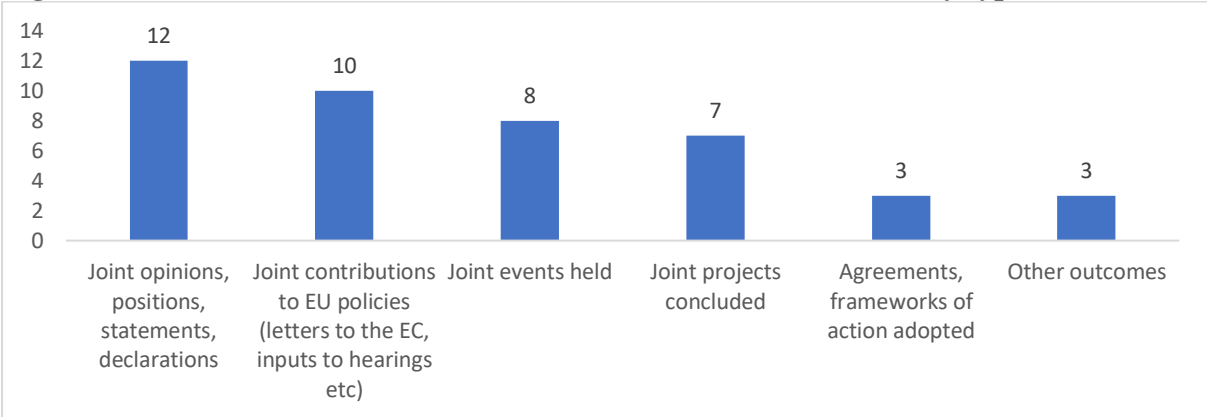
1.1. Latest outcomes of the ESSDCs since December 2022

In this section, the survey gathered views and experiences with implementing the European sectoral social dialogue in the respective sectors represented by different Secretariats.

The survey results show a rich landscape of outcomes reported by the Secretariats in their respective ESSDCs, demonstrating an active participation and collaboration with their social partners. As shown in Figure 1, a total of 43 different types of ESSDC outcomes were identified in the period December 2022-July 2023, averaging nearly 3 outcomes per Secretariat.

Looking at the different possible types of ESSDC outcomes, the common trend across the sectors is the prevalence of the joint opinions, positions, statements, and declarations, reported by the majority of the Secretariats (75% corresponding to 12 Secretariats). This is followed by joint contributions to the EU policies with their respective social partners, reported by 10 or 63% of Secretariats, indicating an important joint work towards the EU institutions. Less frequent are joint events and joint projects, which were reported by 8 and 7 Secretariats respectively, despite the important work in the context of the respective ESSDCs.

Figure 1: The latest outcomes of the ESSDCs since December 2022, by type



Source: Project survey, 2023, n=16, multiple answers allowed.

An important achievement in the respective ESSDCs was the signature of the framework agreements by two sectors, both covering skills, which indicates the significance of the topic across sectors.

Box 1: Frameworks of actions on the issue of skills in the audiovisual and railway sectors

The social partners in the audiovisual sector concluded a Framework of Actions on skills - a joint initiative of the social partners of the Audiovisual & live performance sectors.³ The Framework aims to support across Europe the discussions, exchange, knowledge, development and take up of training and skills development in view of the ongoing societal, economic and specifically sectoral changes. Concrete actions suggested by three core topics include:

³ european-foa-on-skills-in-av-and-lp.pdf (fim-musicians.org)

- The digital environment: adaptation and innovation. The suggested actions are accompanying organisations and professionals in understanding where they stand in the ‘digital transformation’ process and what their needs are; developing a training catalogue for the acquisition of skills in the digital environment; supporting the sector in developing its infrastructures and capacity to innovate in the long term and helping the sector acquire the necessary knowledge and skills to sustain its action, explore new creative paths, adapt and grow in the digital environment.
- Accompanying transitions: Attractivity, inclusivity and sustainability: communicating about job opportunities and diversifying entry paths into the sector; developing training programmes on environmental sustainability; rethinking recruitment processes, and raising awareness on equality and diversity and reviewing the training offer to make sure it is equally accessible and relevant to all.
- Access to training for all: the role of social dialogue, the need for public policies, the potential of sector-level initiatives, and the opportunities of EU-level co-operation: changing the mindset towards lifelong learning; developing a training offer accessible to all in the ecosystem; experimenting with more qualitative and structured ‘on-the-job’ training models; formalising the right to training within organisations, through sector social dialogue, and making use of general credit systems when relevant and making the best use of European co-operation and funding opportunities.

Increasing the presence of women and gender equality in the railway sector, which is with the aim of the Women in Rail Agreement between CER and ETF.⁴ This is important, because the share of women is about 20% in the railway sector in Europe. Ensuring equal opportunities for women and men will help attracting and retaining women into the sector. This agreement aims to attract more women to the rail sector, give women more protection and guarantee equal treatment in the workplace thanks to measures agreed under the headlines of general gender equality policy, which cover areas such as how to attract more women to the sector, reconciling work and private life, promotion and career development, equal pay, health and safety and work environment and prevention of sexual harassment and sexism.

The thematic analysis of the different ESSDC outcomes highlights **common horizontal priorities** namely joint social partner responses to skills, digitalisation, sectoral transformation and the EU regulatory initiatives.

In relation to the common topic of **skills under the ESSDCs**, two Secretariats have developed joint declarations with their social partners and one Secretariat held a joint event. Here, important connection was made in the ESSDCs with the 2023 European Year of Skills. In particular:

- In the temporary agency sector, WEC-Europe and UNI-Europa negotiated joint recommendations on the European Year of Skills.
- In the postal sector, the last joint declaration signed in December 2022 was on Training and Work Environment in the Digital Transition (which is also linked to the common priority of Digitalisation, see below).
- In the metal, engineering and technology-based industries, CEEMET reported a joint event organised in the framework of the European year of skills "Social partners in action for skills in the metal, engineering and technology based industries" on 5 June 2023.

⁴ [European Social Partner Agreement on Women in Rail \(cer.be\)](https://cer.be/en/2022/04/european-social-partner-agreement-on-women-in-rail)

Moreover, the following Secretariats have reported their renewals to **the apprenticeship pledges**, together with their social partners. This was the case in the hospitality, metal and commerce sectors, as follows:

- In the hospitality sector, social partners worked to further implement the joint pledge to enhance quality and attractiveness of apprenticeships schemes in the European hotel and restaurant sector and continued to collect and share information about apprenticeship schemes in the Member States.
- In the metal, engineering and technology-based industries, CEEMET and industriAll Europe are members of the European Alliance for Apprenticeships since June 2018. In July 2021 the MET sectoral social partners renewed their pledge with new commitments regarding apprenticeships schemes.
- In addition, on 8 June 2023 Eurocommerce renewed their apprenticeship pledge. The platform that aims to strengthen the quality, supply and image of apprenticeships in Europe and promote the mobility of apprenticeships. The renewal of this pledge should be taken as a commitment to continue to share best practices.

In relation to the common topic of **addressing digitalisation and Artificial Intelligence (AI)**, joint ESSDC-based initiatives were reported in terms of joint positions by three Secretariats, one joint project and one joint event, as follows:

- Joint conclusions on artificial intelligence in the MET industries were adopted on 15 March 2023. Similarly, in the chemicals sector, ECEG-industriAll adopted a joint position paper “Europe needs to make its STEM strategy a reality now”⁵. Also, the EBF has signed joint declarations on topics due to the necessary changes in the banking sector due to COVID-19. These were on topics such as "remote work and new technologies", "impact of digitalisation on employment", and "Joint statement of the European Social Partners in the Banking and Insurance Sectors on the COVID-19 Emergency Crisis".
- Ceemet and industriAll Europe are members of the ongoing EU project Bridges 5.0 (financed under the EU HorizonEurope) focused on making the transformation to Industry 5.0 faster and better.
- CEMR has organised a joint conference on digitalisation through social dialogue in local and regional governments in June 2023, together with EPSU.

The challenges associated with the green transition were addressed in two ESSDC initiatives including a joint project between social partners and establishment of a broad coalition to support the just transition. For instance:

- In the chemicals sector, in May 2023, ECEG and industriAll Europe concluded the project titled “On the Road to Climate Neutrality 2050”.⁶
- The coalition for a Just Transition for the Automotive industry was established and the social partners Ceemet and industriAll Europe together with other industry associations and NGOs are members of this coalition.

Related joint actions included joint statements issued by social partners regarding the impact of the energy crisis, reported in both the chemicals and audiovisual sectors. Examples include:

- ECEG-industriAll Europe Joint Statement on the impact of the energy crisis on the EU chemical industry.⁷
- Additionally, social partners in the audio-visual sector issued a joint statement addressing the impact of the energy crisis.

⁵ https://www.eceg.org/_files/ugd/977a5c_41fb74335b384171bfa217e0ad22c935.pdf (13/5/2022)

⁶ More information about the Social Partners' project can be found at: <https://www.eceg.org/projects>.

⁷ Available at: https://www.eceg.org/_files/ugd/977a5c_d8615a48cb134b1685c384377a3e21b5.pdf.

A final common thread in the work of ESSDCs was developing joint responses and inputs into the **EU regulatory initiatives and work of institutions, reported by four Secretariats, as follows:**

- CEEMET reported a joint call for a revision of the EU Public Procurement Directives.
- On 22 March 2023, CER and ETF, in the framework of an ad-hoc SSDC Railways, as social partners adopted a 'Joint-Recommendation for the revision of the Train Drivers Directive'. This is following a Joint-Statement already published in December 2022 to reinforce the position of the social partners with regards to the revision of this important legislation for the sector⁸.
- CEMR reported that joint ESSDC achievements include a contribution to a European Parliament hearing on the working conditions of firefighters.
- FIEC reported a joint cooperation in the ELA campaign on construction and co-chairing of ELA workshop (on social ID cards). This highlights joint work of social partners in the construction sector to engage with a new EU agency the European Labour Authority.

When asked about their views on existing challenges in developing the ESSDCs in their respective sectors, the Secretariats were almost equally split on this question. Nine respondents indicated having no challenges and eight pointed out a number of challenges in developing their respective ESSDCs. When asked to elaborate the nature of these challenges (see Table 2), most Secretariats referred to the challenges in organising the meetings, the lack of logistical support from the European Commission for the exchanges, the offered online meeting tools being missuited for the interactive discussions, the restriction to one in-person meeting per year and the lack of more translation support. Two Secretariats also referred to the challenge of administrative burden to apply and run joint EU funded projects with their social partner.

Three Secretariats also identified the challenge with respect to involving their national members to participate in the European level social dialogue activities, which is also related to different traditions, strengths, and cultures of sectoral social dialogue at the national level. Noteworthy is that only one Secretariat reported “political” challenge, in terms of attempts to politicise the agenda of the ESSDC.

Table 2: What are the main problems in developing the ESSDCs?

Challenge	Number of respondents
Lack of logistical support, administrative burden to organise SD meetings	8
Involving national members	3
Administrative burden to apply to and run EU-funded projects	2
Attempt to "politicise" issues	1

Source: Project survey, 2023, n=13, multiple answers possible.

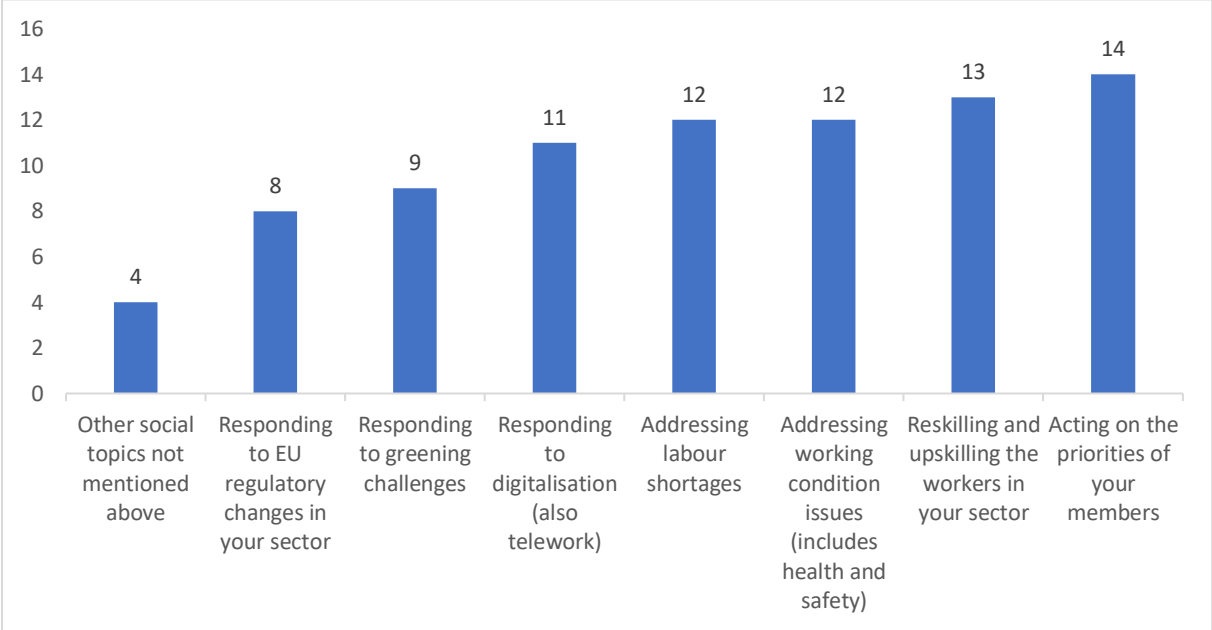
1.2. Policy priorities in the ESSDCs

In this section of the survey, the Secretariats reported on the policy priorities in their respective ESSDCs. Overall, the findings show **core policy priorities shared across many sectors.** Figure 3 shows identified policy priorities which are common between the sectors. Unsurprisingly, almost all Secretariats see the need to act on priorities of their members when shaping their ESSDCs. Furthermore, also on several thematic priorities, sectors tend to see

⁸ <https://shorturl.at/bxzH0>

common issues, such as reskilling/upskilling (reported by 13 Secretariats), addressing working conditions (12) and labour shortages (12), responding to digitalisation (11) and greening challenges (9). For eight Secretariats, responding to the EU regulatory changes is a key priority in their ESSDC. Only four Secretariats indicated other priorities not captured in the previous categories.

Figure 3: What types of policy priorities from the list below are the most important priorities for your sector ESSDC?



Source: Project survey, 2023, n=16, multiple choices allowed. The numbers indicate the number of “yes” responses in each answer category.

Additional information from the Secretariats on their key policy priorities in the respective ESSDCs is helpful to further understand **the nature of such priorities, their commonalities and differences.**

The primary common policy priority resolves around attracting and retaining a skilled workforce, ensuring adequate upskilling and reskilling, and providing employees with the necessary skills to support digital and green transitions in the sectors. The challenge is exemplified by CEEMET in the metal industries where the skills gap impacts very negatively on companies and job creation. Moreover, the up-and re-skilling of the workforce (linked to the skills gap) highlights the importance of continuous training to successfully manage the twin transitions.

Another related challenge is addressing labour shortages. Insights from Secretariats in the commerce, construction and chemicals sectors shed light on the nature of this policy challenge. Additionally, information from other sectoral Secretariats provided directly to BusinessEurope demonstrates the scale of the labour and skills shortage challenge. Many Secretariats monitor this issue through regular research and reports (see Box 2).

Box 2 – sectoral experiences and data on labour and skills shortages in the banking, chemicals, road transport and temporary agency sectors

In the banking sector, the EBF regularly surveys over 900 members on key topics in HR, job satisfaction, working conditions, etc. In 2023, for the first time, they asked how they assess their job and work environment when they consider attracting enough skilled workers⁹. 20.6 % describe obtaining enough skilled workers as challenging, 30.4 % describe the situation as acceptable, but by no means good or very good. For private banks, the lack of skilled workers is absolutely a problem. However, the working conditions have been described as good to very good by the employees for years. The rating of job satisfaction in the private banking industry has been high for many years: over 80% of employees are regularly extremely satisfied, very satisfied or satisfied with their work.

In the chemical sector, ECEG and industriAll Europe collaborated to develop a Toolbox of good practices for the European chemical, pharmaceutical, rubber, and plastics industries. This document consolidates best practices from their respective memberships across various areas, including:

- Sustainability
- Age management policies
- Training, lifelong learning (LLL), and vocational education and training (VET)
- Work-life balance policies
- Diversity and inclusion
- Career development and occupational safety and health (OSH) measures
- Recognition and validation of acquired competencies
- Voluntary mobility
- Mentoring programs
- Health and well-being at work
- Future of work

This initiative was last updated in March 2021, with plans for the next update in the near future.

In the road transport sector, regular reports from IRU monitor the extent of labour shortages in the sector. In 2021, 425,000 truck driver positions were unfilled and 105,000 bus and coach positions were unfilled in 2023¹⁰. Driver shortage is expected to further grow, due to increased transport demand and ageing workforce in the sector. With less than 7% truck drivers and less than 3% of bus and coach drivers under 25 years old in Europe, not enough drivers join the profession to replace those who retire every year. The growing chasm between retiring and new drivers is set to triple the rate of unfilled truck driver positions, to over 60% by 2026, and increase by more than five-fold for bus and coach drivers, to almost 50% by 2026. Without action to make the driver profession more accessible and attractive, IRU estimates that Europe could lack over two million drivers by 2026, impacting half of all freight movements and millions of passenger journeys.

⁹ <https://www.agvbanken.de/dossier/the-real-new-normal-mobile-and-hybrid-work-in-2023>

¹⁰ IRU European Driver Shortage Report 2022; IRU Driver Shortage Report 2023 Passenger- Europe Executive summary (More info: <https://www.iru.org/news-resources/newsroom/europes-bus-and-coach-driver-shortage-widens-54-grim-outlook-2028>)

In the temporary agency sector, at the European level, EC Europe published 2022 a strategic issue paper, “Making better Matches”, on addressing labour and skills shortages.¹¹ It noted that The main drivers behind the current labour shortages are largely linked to mismatches between supply and demand, such as inactivity, a re-evaluation of work, cross-border mobility of workers and the long-term impact of the Covid-19 pandemic –with workers having left certain sectors and most likely not returning after having given their career a new orientation. In most European countries, the number of unemployed people is still significantly higher than the number of (unfilled) vacancies. This suggests that it is not workforce availability that is the main challenge, but rather a workforce mismatch. Skills and labour shortages are also addressed in the EU Sectoral Social Dialogue on temporary agency work as part of the current “Partners” work programme. In May 2023, WEC-Europe and UNI-Europa adopted joint sectoral social partner recommendations in the framework of the European Year of Skills.¹²

As an example, one of the key priorities in **the commerce sector** is the **acute skills and labour shortage** in the industry. More than 40% of companies that took part in the Triple Transformation Survey, that formed part of the study EuroCommerce carried out with McKinsey, cited difficulty with finding talent with the right skills. In parallel, the survey showed that only 50 % of the current workforce in the sector is ready for the skill and talent transformation that lies ahead. This is on top of the fact that the sector is already facing a skills shortage, for example, regarding IT specialists, lorry drivers as well as instore staff including bakers and butchers. Moreover, the general lack of digital skills exacerbates the existing skills shortage, necessitating the acquisition of even new skills. In the coming years, retailers and wholesalers will have to accelerate a comprehensive skill and talent transformation to contribute to the lifelong learning of their employees and to stay competitive.

A Eurocommerce’s recent study indicates that European retailers and wholesalers may need to hire as many as 800,000 to 1.5 million new people every year until 2030, and 10 to 13 million employees will need to acquire new skills. Across functions and roles, the share of employees with higher qualifications will likely increase. Thus, EuroCommerce has committed in the Skills Partnership to promoting initiatives and sharing information on lifelong learning, contributing to the facilitation of life-long employment of employees (both inside and outside the sector) and continuous learning. Making life-long learning the norm, developing a training culture, increasing participation of employees in reskilling and upskilling initiatives, continuing informal and non-formal learning, and increasing the ease of demonstrating what training has been provided are all desired outcomes of this commitment.

Similar issues with labour shortages have **also been reported in the construction and chemicals sectors**. In construction sector, the skills shortage was already a challenge before COVID, but it was exacerbated in the aftermath of the pandemic. One approach to addressing this issue is through upskilling and reskilling the workforce, promoting apprenticeship schemes at the national level, and advancing education and training. These are some of the main objectives of the ESSDC.

Likewise, the **chemical industry’s** competitiveness hinges on ensuring that its workforce adequately trained to navigate the green and digital transitions. With initiatives like the Green Deal, the sector faces a dual challenge of transition. Failure to address labour shortages could

¹¹ WEC-Europe-Strategic-Issue-Paper-Skills-Shortages-August-2022-final.pdf (weceurope.org)

¹² European Year of Skills: Social Dialogue as a Driving Force Forward - World Employment Confederation (weceurope.org)

result in a skilled workforce shortage of up to 11% by 2030. The ECEG's position paper on „Labour and skills shortages in the European Chemical industry“ from October 2023 highlights the industry's challenges in attracting and retaining a skilled and offers suggestions and recommendations for addressing this issue successfully¹³.

A further common policy challenge across many sectors is responding to digitalisation which is exemplified by the ESSDC priorities in the metal, banking, postal, and local and regional government sectors.

In the ESSDC of the metal sector, one of the key focus is the impact of digitalisation/automation/AI on jobs/work organisation and skills in the MET industries - how it affects workers and companies, how it affects collective bargaining etc. Responding to digitalisation is important as the rapid transformation of the MET industries impacts heavily the world of work. For this reason, the social partners are discussing how the digital transformation of industries impacts on work organisation and skills. They are also following very closely the discussions (EU cross sectoral social partners) on remote work and right to disconnect.

Also in the banking sector, digitalisation is one of the core priorities. The social partners initiated in the “Banking in 2030” project - the impact of digitalisation and artificial intelligence on banks, bank workplaces and other service-related issues. Digital and AI developments in banking is changing the profile of workers. Lifelong learning needs to ensure employees are trained to use these new technologies and grow in their careers.

Similarly in the postal sector, the policy priorities are around the social impact of digitalisation on the sector, the evolutions of jobs in a context of decline of the main traditional mail activities and growth of parcels. In a fast-evolving sector impacted by digitalisation, it is important to understand the social impacts of these evolutions and be able to support them. Our members face common issues in terms of evolutions of the main activities: decrease of mail volumes and increase of parcels. They all need to better anticipate and manage the social impacts of these evolutions.

Digitalisation is also a mounting challenge for local and regional employers in a sector that presents several challenges (including ensuring sufficient digital skills, the pressure on local finances, the absence of relevant provisions in sectoral bargaining) when it comes to digitalisation.

For several sectors, another key policy priority in the ESSDC is to respond to the EU regulatory changes, as shown by the experiences in the local and regional employers, rail, private security and cleaning sectors.

A number of legislative initiatives have impacted significantly on local and regional authorities (e.g. minimum wage directive and its provision on public procurement, pay transparency, working time and its recent case-law) and required closer attention within the SSDC. In the rail sector, for a possible revision of the Train Drivers Directive an agreement was achieved with the Unions on a common position linked to the communication regime and certification scheme. The effectiveness of the Public Procurement Directive is important in the private security and cleaning sectors. In the private security sector, public procurement policies, practices and lack

¹³ The position paper is available at:
https://www.eceg.org/files/ugd/977a5c_498212d19f6b4d31848d982d42f25fed.pdf

of effective implementation of the EU Public Procurement Directives in many Member States incentivise some bidders in the market to ignore social criteria, weakening the positive impact of collective bargaining and the value of social dialogue. The revision of the public procurement directive are very specific issues to the cleaning sector, with public procurement having a vital role in terms of financial sustainability for many of the national affiliates.

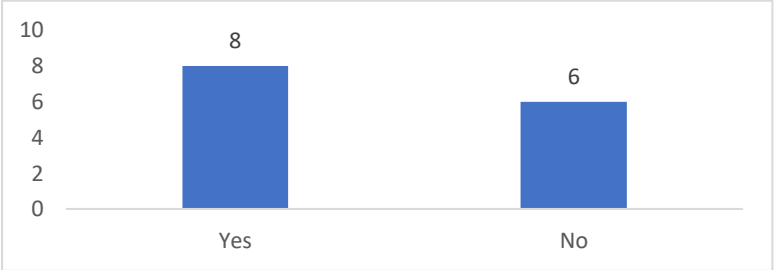
Amongst other policy priorities not mentioned above, two topics emerged, related to labour migration and promotion of gender equality.

The policy priority of labour migration can be exemplified in the experience of the construction ESSDC context. This issue is more specifically relevant for this sector due to the specificities of the industry. Contrary to most other industries where the production site is fixed and the final product moves, in construction, the production site is moving to where the building will be built. Therefore, the necessary workforce and material will be moved from site to site.

The policy priority of gender equality is reported by the rail ESSDC. Increasing the presence of women and gender equality in the railway sector, which is with the aim of the Women in Rail Agreement. This is important, because the share of women is about 20% in the railway sector in Europe. Ensuring equal opportunities for women and men will help attracting and retaining women in the sector.

Next, the Secretariats were asked whether on any important policy priorities they experience tensions or conflicts with their social partner counterpart. Amongst 14 Secretariats which answered this question, **the majority (8) did report experiencing such tensions with their social partners.**

Figure 4: Are there important policy priorities where you are experiencing tensions and conflicts with your social partner (trade union)?



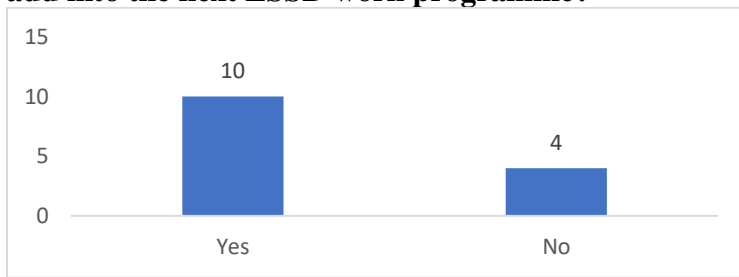
Source: Project survey, 2023, n=14. Single responses only.

When asked to elaborate on these tensions, several Secretariats reported challenges specific to their sector (e.g. with respect to the asbestos at work directive in the construction sector). At the same time, several topics where disagreements are common across several sectors are:

- How to deal with the labour shortages (reported in the education, LRG, metal sectors)
- How to agree rules on the working time (in the LRG, cleaning sectors)
- How to reflect the new forms of employment in the collective bargaining processes (digital labour platforms in the temporary agency work, solo self-employed in the construction sector).

Importantly, the majority of Secretariats also reported that new policy priorities have emerged recently which would require them adding to the next ESSDC work programme (see Figure 5). Amongst 14 Secretariats, the new policy priorities recently emerging were reported by 10 Secretariats.

Figure 5: Are there policy priorities which emerged recently and which you would like to add into the next ESSD work programme?



Source: Project survey, 2023, n=14. Single responses only.

A notable recent priority that has emerged across several sectors is the utilization of labour migration to tackle skills and labour shortages. Secretariats in the construction, chemicals and commerce sectors have reported this trend. For instance, in the chemicals sector, one of the solutions proposed by ECEG to address labour shortages is to attraction of talent from third countries. Consequently, a recent focal point has been the prioritisation of legalised labour migration of skilled workers from third countries.

Also in the commerce sector, the Secretariat is aiming to incorporate issues related to international labour migration, particularly in the face of a labour shortage crisis. This issue is closely linked to the successful development of the EU Talent Pool, designed to facilitate international recruitment, and provide opportunities for skilled third-country nationals to work in sectors of EU and Member States interests, notably by facilitating the matching between vacancies in the EU and skilled third - country nationals from outside the EU.

Finally, with respect to the future ESSDC, the Secretariats were asked to reflect on **their key strategic priorities going forward and expectations/strategies for the sectoral social dialogue in the (near) future.** Several common threads emerge in the Secretariats' responses. To start with, a common priority is to ensure that the future ESSDC work programmes reflect appropriately the core mutual concerns for both social partners. They should also serve as platforms for continuing fruitful exchange and genuine cooperation between both social partners, which is also seen by many as highly valued by the EU Commission and institutions. In terms of more concrete strategic priorities, a number of common themes were identified as follows:

- Building the capacity of national members to participate in the national and European social dialogue structures and national collective bargaining processes;
- Promotion of upskilling and reskilling of the workforce in the sectors;
- Ensuring that the workforce is fit for upcoming challenges and transformations.

1.3. Joint activities with the social partners – ongoing and planned

In this section, the Secretariats were asked to describe joint activities with their social partner counterparts in their respective sectors, both ongoing and planned.

Currently ongoing joint activities

12 Secretariats reported running joint projects with their social partner in the timeframe covered by the survey, since December 2022. This information allows to identify several common topics on which several sectoral social partners are working on.

To start with, a number of Secretariats reported ongoing joint projects with their social partners related to the **forward planning and strategic anticipation of sector trends** – in the banking, construction, chemicals and postal sectors.

In the Banking sector, the two-year project "Banking in 2030" is in place from July 2022 until June 2024. Looking at the impact of global trends (for example artificial intelligence and digitalisation) in shaping the banking industry and its employees. The final project report is due in May 2024 along with a conference in Brussels.

In the construction sector, the project DESOCO2¹⁴ has the main aim of discussing the social and economic challenges which will determine the future of the construction labour market (i.e., in the fields of employment, health and safety and vocational education and training).

In the chemical sector, spanning from February 2021 to May 2023, ECEG and industriAll Europe collaborated on the social partners' project titled "On the Road to Climate Neutrality 2050". The project achieved the following objectives:

1. develop scenarios outlining technological pathways and their implications for companies and workers in the decarbonization of industries.
2. identified key themes for social partners within this framework.
3. created tools and recommendations for social dialogue at the national level within this context.
4. enhanced the level of trust between social partners and improve the quality of social dialogue by collaboratively developing scenarios and solutions during dedicated workshops.

The postal sector social partners implemented the project "The world of work in the postal sector in 2030" which enabled to elaborate 13 postal characters who may exist in the 5 scenarios for the sector in 2030. It was conducted between April 2021 and September 2023. This was a particularly innovative and forward-looking project.

Furthermore, dedicated joint projects are implemented to **build the capacity of social partners in the sectors** at the national level in the construction, temporary agency work, and live performance sector. In the construction sector, the TANSIRC 2 project aimed to develop a new start to the social dialogue in the central and eastern European countries.¹⁵ In the temporary agency work sector, a new project on capacity building will be started in September 2023 following an application submitted in 2022. The project will run for two years. Another joint project starting in September 2023 focuses on capacity building of social partners in the live performance sector, including an overview of social partner initiatives and collective agreements. Further details about these projects are provided in Box 3.

Box 3: examples of joint European sectoral social partner projects to build the capacity of social partners at the national level

In the construction sector, the TANSIRC 2 project aims to develop further the social dialogue in the central and eastern European countries.¹⁶ This is a follow up from a previous project, as the European social partners of the construction industry (FIEC and EFBWW) and the European Association for Paritarian Institutions (AEIP) implemented in 2018-2020 the

¹⁴ <https://www.fiec.eu/our-projects/current-projects/desoco2>;

¹⁵ <https://www.fiec.eu/our-projects/current-projects/tansirc-2>

¹⁶ <https://www.fiec.eu/our-projects/current-projects/tansirc-2>

EU funded project “Towards A New Start of Industrial Relations in Construction in Central and East European Countries (CEEC’s)” (TANSIRC). The first project implemented in the central and eastern European countries (in Bulgaria, Croatia, Serbia, Czechia, Hungary, Latvia, Lithuania, Poland, Romania, Slovenia, Northern Macedonia and Montenegro) involved a mapping which showed that the social dialogue is quite weak in the region and a lack of communication between employer organisations and trade unions.

With this follow-up project (TANSIRC 2, 2022-2024) partners aim at creating a stronger added value for the social dialogue in construction industry in the central and eastern Europe and to build up the capacity of the trade unions and the employers federations to fully participate in the systems of industrial relations. The general aim of this project is to (re)build, promote and foster industrial relations in the construction industry in the region. The choice of focusing in particular on the region is based on an internal assessment of the European social partners (FIEC and EFBWW), and the outcome of the EUROFOUND representativeness study, showing that the system of industrial relations in the regions have deteriorated significantly in the last decade.¹⁷

The project focusses on joint social partner activities in the construction sector in Bulgaria, as the sector social partners in the country put forward concrete joint activities to implement. The partners undertook a joint market research exercise to map out how the Covid-19 pandemic and digitalisation impacted the construction industry, as well as the new emerging professions and new skills requirements in the industry.

In 2024, project is planning activities where the sector social partners will jointly visit schools in Bulgaria to promote the profession and thus jointly work towards improving the image of the sector in the country. Such joint activities help build the social dialogue structures between the social partners through joint and shared activities, such as developing, jointly owning and using the market research outcomes. It is also helped by the tripartite sectoral agreement signed in Bulgaria to promote the social dialogue.

The concrete outcomes expected from the project in Bulgaria included:

- Promoting EU funding (ESF+) opportunities and help to develop possible social dialogue activities.
- Addressing undeclared work and illegal practices in CEECs.
- Reinforcing the currently social dialogue in CEECs and the lack of communication between national partners in construction industry, thereby strengthening their cooperation.
- Identifying disappearing construction professions due to digitization, together with the new skills and competences and ways of working needed.
- Improving the image of construction sector in society and thereby attracting more young people and women.
- Identifying which challenges the COVID-19 pandemic has brought to the construction industry and how to address them.

The TANSIRC 2 project is implemented alongside another joint social partner project in the construction sector, “Follow up of Decentralized Thematic Social Dialogue for the Construction Industry” (DESOCO 2).¹⁸ The main aim of the project is to discuss the social and economic challenges which will determine the future construction labour market (i.e., in the fields of employment, health and safety and vocational education and training).

¹⁷ See the representativeness study conducted in 2015, [Representativeness of the European social partner organisations: Construction sector | European Foundation for the Improvement of Living and Working Conditions \(europa.eu\)](#). The study is being updated in 2024.

¹⁸ [DESOCO2 :: FIEC](#)

During two years of the project, FIEC and EFBWW will organise 4 thematic meetings in the different Central and Eastern European countries with the sectoral social partners to discuss the main thematic challenges. This is expected to help to ensure that the sectoral members in the region remain closely informed and involved in the social dialogue activities at the European level.

The capacity building projects in the sector use the results of the representativeness studies concluded by the Eurofound. At the time of this report, the study for the construction sector is being prepared.

In the temporary agency work sector, WEC-Europe and UNI-Europa are currently engaging in the capacity building project, starting in September 2023. The project is aimed to develop practical guidance for employers and trade unions, including approaches, tools and methods for strengthening the capacity of the sectoral social partners. Seminars will be organised to enable the exchange and discussion of good practices, focusing on Southern Europe and Central and Eastern Europe. There are planned regional workshops and a closing event to be carried out over two years. The regional workshops are expected to lead to practical guidance for social partners to put in place innovative practices focused on training and social protection for agency workers. They would facilitate the discussions between the national sectoral social partners on how to support further training and social protection for workers in the sector, exchange practices and lessons learnt from members' experiences.

The project builds on the experiences of previous joint social partner project undertaken by WEC-Europe and UNI-Europa which identified 15 social innovation practices for skills enhancement and training, working conditions and social protection in the temporary agency sector. The practices are intended to transfer to other countries. The project resulted in the joint social partner recommendations on social innovation in ensuring working, learning and social protection in the sector.¹⁹

The capacity building projects in the sector use the results of the representativeness studies concluded by the Eurofound. The study for the temporary agency sector identified WEC-Europe as the only representative employer organisation in the sector at the European level, with 25 members across EU27.

In the live performance sector, the social partners have launched a joint project in 2023-2025 to provide capacity building to their memberships across Europe.²⁰ The project is addressed to members in all countries, and is not focussing on specific regions or groups of members. Capacity building has been a long-standing agenda item on the work programme of social partners in this sector, starting with the accession of new Member States in 2004. Since then, capacity building has been expanded to include representatives from across Europe.

A mapping research exercise will form a basis for the project activities. It will help to focus the capacity building on themes that are the most important issues for the sector, based on the priorities identified by national members. Given the wide range of aspects within the social dialogue programme, this capacity building project will also use meetings to disseminate information gathered during other joint projects and promote tools created by the European social partners (OiRA, gender equality, creative skills). This will allow national

¹⁹ [Social Innovation - World Employment Confederation Europe \(weceurope.org\)](https://weceurope.org)

²⁰ [LP capacity building project: Strengthening capacities in the live performance sector \(Sept. 2023-Aug. 2025\) \(pearle.eu\)](https://pearle.eu)

social partners (employers' associations and trade unions) to support and inform their members better on key challenges in the sector.

The project outcomes will provide crucial information/good practice for increasing the capacities of national social partners, and for building strategies that support and improve social dialogue and cooperation at the national level. It will also allow to provide input to the OMC group on artist working conditions, and to the EP resolution on the social situation of the artist and the recovery.

Concretely, the project includes the following actions:

- An initial mapping of the sectoral social partners initiatives, their current priorities, concerns, challenges and collective bargaining priorities and existing collective agreements. Based on this initial mapping, a series of topics for common capacity building priorities will be identified and the subsequent activities organised around these.
- 3 capacity-building meetings in total, including a presentation of tools and publications developed by the European social partners, and of the new policy orientations in relation to European social dialogue and European social policy.
- One online final event for the presentation of the results from the project activities.
- A mapping report and presentation of social partner initiatives and achievements, create an online database of such resources.
- Awareness-raising through communication and information provision.

This capacity building project builds further on the latest representativeness study on the live performance sector concluded by Eurofound in 2021.²¹ This study identified EURO-MEI, FIA and FIM – representing employees – and PEARLE* – representing employers – as the representative European-level social partner organisations in the live performance sector. On the employers' side, the membership of PEARLE*, with 43 members, covers the majority (61%) of the 72 sectoral employer organisations in the EU27 and the UK. PEARLE* has affiliates in 18 Member States as well as the UK. The nine Member States in which PEARLE* has no members are Croatia, Cyprus, Greece, Ireland, Latvia, Lithuania, Luxembourg, Malta and Romania. The largest sectoral employer organisation in 13 Member States is represented in PEARLE*. From the perspective of collective bargaining, there are 53 employer organisations in the sector that are involved in collective bargaining. Of these 53, 31 organisations (58%) are affiliated with PEARLE*.

A third common thread of the currently joint projects between the social partners was **thematic focus on skills**, reported in the construction, commerce, private security, and audiovisual sectors.

In brief, in the construction sector, a project Construction Blueprint (Erasmus+ project in which both FIEC and EFBWW were involved) is seeking to develop a new strategic approach to sectoral cooperation on skills.²² HOTREC and EFFAT are organising an upcoming joint event, under the umbrella of the European Year of Skills on 20 November 2023 at the EESC. INTEL - Skills Intelligence for the Private Security Services (March 2021 - February 2023) was a joint project of CoESS and UNI Europa²³. The social partners have finished a project on skills with

²¹ Eurofound (2021), Representativeness of the European social partner organisations: Live performance sector, Sectoral social dialogue series, Dublin. [Representativeness of the European social partner organisations: Live performance sector | European Foundation for the Improvement of Living and Working Conditions \(europa.eu\)](https://www.eurofound.eu/en/publications/representativeness-of-the-european-social-partner-organisations-live-performance-sector/)

²² <https://constructionblueprint.eu/>

²³ Further information on www.securityskills.eu

the audiovisual sector but have already a follow up project with them starting in September 2023. Further details about these projects are provided in the Box 4 below.

Box 4 – joint social partner projects and activities on skills

In the construction sector, a project Construction Blueprint (Erasmus+ project in which both FIEC and EFBWW were involved) is seeking to develop a new strategic approach to sectoral cooperation on skills.²⁴ The main objective of Construction Blueprint is to develop a new sectoral strategic approach to cooperate on skills in the Construction industry, and support a better matching between skills need of companies and skills provided by training centres. To achieve this goal successfully, the project gathers three Sectoral European Organizations, along with nine National Sectoral representatives and twelve Vocational Education and Training (VET) and Higher Education providers from twelve European Union countries. This Blueprint will be achieved through a Sectoral Skills Strategy, that will bring together lessons learned from other initiatives and will be outlined from a holistic approach, identifying political, economic, social, technological, legal and environmental factors which may be affecting sector skills and training offer. The following activities will be developed during the project:

- Collecting good practices at national and regional level to illustrate and promote other initiatives addressing skill gaps, integrated in an Interactive Map.
- Designing and piloting training curricula for Energy Efficiency, Circular Economy and Digitalisation for the construction industry; also different online trainings (Massive Open Online Course -MOOC-) on these topics will be available.
- Creating a tool (Observatory) to provide valuable information about particular skill needs at regional/national level.
- Identifying and selecting occupational profiles that should be updated in terms of Energy Efficiency, Circular Economy and Digitalisation.
- Carrying out an outreach campaign for the Construction industry to promote its attractiveness among youngsters and women, identifying and promoting solutions to facilitate mobility of construction workers in Europe.
- Creating a new virtual tool (website) where all project outputs will be available for stakeholders, as well as a Sector Skills Alliance platform for collaborative work.

In the **private security** sector, INTEL - Skills Intelligence for the Private Security Services (March 2021 - February 2023) was a joint project of CoESS and UNI Europa²⁵. It aimed at understanding, anticipating, preparing and managing labour and skills shortages in the private security services industry across the European Union. The INTEL project included the following activities:

- the set-up of a Social Partner Specialist Group on Skills Intelligence.
- a survey on current and future labour and skills shortages in the European private security services industry, delivering evidence-based data that is assembled in a dedicated report.
- a project study on existing best practices and recommendations to national Sectoral Social Partners, aiming to help them in understanding, anticipating, preparing and managing labour and skills shortages in the private security services industry across the EU

²⁴ <https://constructionblueprint.eu/>

²⁵ Further information on www.securityskills.eu

- national workshops which aimed at discussion findings and recommendations made by the INTEL project at national level. They were organised by CoESS' members, and likewise supporting partners of the project, in Croatia (CSA), Germany (BDSW) and Sweden (Säkerhetsföretagen) in autumn 2022.
- a multi-stakeholder conference to conclude the project in February 2023 and launch the project website.

In the live performance sector, the social partners have adopted a Framework on Actions on skills in 2023 and started a joint project to support its implementation. The FoA builds on the labour intelligence and expertise acquired by the social partners since 2014. The FoA sets out shared values, common objectives, and joint commitments of the social partners to support skills development in the EU. A specific focus is on the digital era. The document also encourages good practices and points towards different fields of action at national and European levels to further promote lifelong learning.

The general objective of the joint project starting in 2023 is to improve the relevance, quality, and accessibility of lifelong learning for sector professionals. The main tool to achieve this objective is the implementation of the FoA. The project has three activity strands that will run in parallel and reinforce each other:

- The promotion and dissemination of the FoA across the EU Member States and regions through the organisation of online and in-person regional meetings (focus on Central and Eastern Europe, Southern Europe and Northern Europe incl. the Baltic countries).
- The support to the networking of national sector skills councils – piloted by national social partners - and other similar bodies to make sure good practices continue to circulate across EU borders and that they reinforce the recommendations put forward by the FoA. Two online and two in-person meetings will be organised in Brussels.
- The coordination of the large-scale skills partnership in the CCIs ecosystem under the Pact for Skills and input from the social partners into the activities and outputs of the partnership. Social partners will continue to co-lead the CCI partnership and they will feed into its work, in particular through the organisation of an online meeting with CEDEFOP and other key stakeholders on the production of labour market intelligence and the collection of data on skills needs trends in the sectors. The European social partners will also participate in the different thematic working groups of the partnership.

In the commerce sector, **Eurocommerce reported a Retail Pact for Skills which was developed and signed in November 2022 with its social partner UNI Europa.**²⁶ The Skills Partnership identifies the importance of skilling, upskilling and reskilling the workforce. The Skills Partnership has five core objectives:

- Promoting a culture of lifelong learning for all
- Building a strong skills partnership with relevant stakeholders
- Monitoring skills supply/demand and anticipating skills needs
- Working against discrimination and towards equal opportunities for all
- Raising awareness & attractiveness of the Retail and Wholesale sector

This includes the need to encourage employees to prepare for a different role inside or outside retail or wholesale. It also includes consideration of the role that employers can play to help

²⁶ [Retail \(europa.eu\)](https://europa.eu)

workers achieve better insight into their perspective on the labour market so that they develop the skillsets necessary for new employment opportunities.

In relation to the topic of skills, this remains a key focus for future joint projects, as identified by Secretariats across various sectors including construction, chemicals, private security, metal, hospital and healthcare, and postal sectors. For instance, in the chemicals sector, starting from September 2023, ECEG is leading the coordination of the project titled "ChemSkills: enabling the green and digital skills transformation of the chemical industry". This project is funded under the Erasmus+ Blueprint budget line for sectoral cooperation²⁷. Another example of planned skills project is the SDC Post submitted a new funding demand in June 2023 for a joint project on the anticipation of skills' needs in the future aiming at elaborating a catalogue of training pathways and at analysing how training and skills can support the enhancement of health & safety.

Comparing the main aims, actions and commitments of joint projects and activities of social partners on skills in the sectors covered in the survey, similarities emerge. They relate firstly to the common strategic approach taken to addressing the skills challenges faced by the sectors, covering a wide range of actions and areas to cover, as well as including a range of stakeholders in the sectors. This wide partnership approach is another common characteristic of joint actions on skills, including social partners, but also education and training providers in VET and HE sectors, think tanks, researchers, industry associations and others.

The aims of the skills-related projects are also often similar, aimed at identifying and sharing existing good practices, as well as developing evidence-based solutions and anticipating the future skills challenges within the sectors on the basis of the intelligence available. In terms of actions taken concretely across the sectors, several common strands of activity on skills emerge, including: mapping and research on the current and future skills needs and challenges, identifying good practices and effective current solutions, organising meetings, exchanges and discussions between social partners' national members with the aim of disseminating the findings and working to identify jointly the common solutions. Information exchange, dissemination and communication of skills related intelligence between the social partners and across national members is another common thread between the joint social partner activities on skills in different sectors.

Finally, two sectors are implementing specific projects jointly on the topic of digitalisation. In the "Local, Social, Digital" project, CEMR together with EPSU, started in November 2022 and will end in November 2024. The project aims at discussing a sectoral follow-up to the cross-sectoral agreement on telework and right to disconnect and generally to boost the capacity of national social partners to address challenges related to digitalisation in their collective bargaining negotiations. The postal sector saw the finalisation of the project "Postal Skills and Work Environment in the Digital Era" which aimed to assess the impact of digitalisation on skills and on health & safety in the sector. The project was conducted between 2020 and 2022.

²⁷ More information about the ChemSkills project is available at: <https://www.chemskills.eu>

Planned future joint activities

Looking ahead, a number of Secretariats also reported planning future joint activities with their social partners. The key **common topics for such future planned activities relate to skills (described above) and health and safety topics.**

A number of Secretariats are also **planning future joint activities on the various aspects of health and safety challenges facing their sectors**, as follows:

- In the live performance sector, the Secretariat we will probably submit this year an application on health and safety with the aim to update the two OiRA tools that exist in the sector.
- In the education sector, EFEE together with its social partner ETUCE also worked outside of the social dialogue on the development of an Online Interactive Risk Assessment Tool (OIRA) for the higher education sector together with EU-OSHA. The thereout gained results will be fed as well into our social dialogue discussions.
- Disseminate and raise awareness of the online tool for risk assessment in the Horeca sector; both social partners in the health sector plan to remain active in the OSHA Research Framework for the Healthsector.²⁸

Starting from January 2024, ECEG has officially joined as a partner of the EU-OSHA ‘Safe and Healthy Work in the Digital Age’ campaign for the period 2023-2025. This campaign aims to foster a prevention culture against the primary health and safety challenges and risks linked with digital technologies. Concurrently, ECEG's social partner, industriAll Europe, is also a participant in this campaign. Additionally, within the chemical ESSDC, mental health at work may emerge as an increasingly significant topic, contingent upon forthcoming legislative developments at the EU level.

1.4. Priorities in the capacity building for the sectoral social partners at the European and national levels

In this section, the Secretariats provided their views on the capacity building needs of their own organisations as well as their national sectoral members. The different aspects of the capacity building were defined using the Eurofound’s definition of capacity building and its objectives in the context of social dialogue and social partners.²⁹

The capacity building needs of European sectoral employers’ organisations

To start with, **the Secretariats provided information on their key capacity building needs.**

In this respect, a key need for many organisations is for a **strong administrative, logistical and financial support from the European Commission** to continue a strong dialogue with trade unions. This includes a range of aspects, including meeting organisation, drafting of minutes and reimbursements of travel expenses, as well as having interpretation into a variety of languages, and translation of social dialogue outcomes (joint declarations, statements, reports). For a number of Secretariats, the issue of personal meetings was key. This is because the frequency of new challenges demands a trusting personal relationship in order to have substantial joint positions reached in ever shorter timeslots. Therefore, to meet in person with other social partners and forge relationships is key as it is difficult to develop these relationships via a screen only.

²⁸ <https://osha.europa.eu/en/themes/health-and-social-care-sector-osh>

²⁹ Eurofound (2020), Capacity building for effective social dialogue in the European Union, Publications Office of the European Union, Luxembourg.

Several Secretariats also referred to the need for **a good level of funding** to ensure smooth implementation of the projects granted with the social partner and an easy access to the EU funded projects for the capacity building. A specific capacity building need was identified in several sectors in relation to building **the capacity of the national members, especially in eastern and central European Member States** – including the construction, temporary agency work, chemicals and hospital sector (see Box 3 for the description of the current capacity building projects in the construction and temporary agency work sectors). Hence, in these sectors, there is a need to strengthen the resources and capacity of national sectoral social partner organisations, especially in smaller markets and in central and eastern Europe. This concerns their general capacity and their role in collective bargaining which remains under-developed. In central and eastern European countries, the Secretariats emphasised the need for both employer and trade union representatives to understand the importance of social dialogue and collective bargaining and to get involved “on a voluntary basis” in social dialogue, the need to strengthen representativeness of the trade union and employers’ organisation and increase their membership. Moreover, the trade unions’ and employers’ representatives are in need for more human resources with the necessary skills to participate in social dialogue (and also more financial resources).

As a specific example of how such member capacity could be developed with more funding was provided by the Secretariat in the postal sector. To be able to get a better involvement of their national sectoral members, the European Secretariat would like to organize on site bilateral meetings with related HR and industrial relations directors in each national postal company to exchange with them on their topics of interest and explain the added value of European social dialogue.

For two Secretariats, the key issue is **developing knowledge, data and information** through systematic research / surveys on the key sectoral issues, such as the challenge of labour and skills shortages. Thus, they see the need for knowledge centres being developed. From this perspective, the importance of up-to-date and comprehensive data cannot be emphasized enough when it comes to analysing skills, identifying needs, anticipating and addressing gaps within the EU labour market.

Next, the Secretariats were asked about their views on their capacity building needs in relation to the organisation-oriented capacities such as the membership structures and developing internal structures (see Table 3). The views expressed show **a common ground between the Secretariats, with most identifying the different organisational needs as very important and important** – including maintaining the membership base, expanding the services to the members, providing a range of support services to the members and evolving internal structures to respond to the needs of the members.

Table 3: What are your needs in relation to your organisation-oriented capacities such as the membership, internal structures? 1 is least important and 5 is most important

	1 least important	2 less important	3 neutral	4 important	5 very important
To maintain / expand the membership of your organisation as a European level social partner	0	0	2	5	9
To continue to provide / diversify / expand services for your members	0	0	2	8	6

	1 least important	2 less important	3 neutral	4 important	5 very important
To continue to provide / diversify / expand support, training, counselling, information and communication about EU matters to your members	0	1	0	9	6
To adapt your internal organisational structures and work practices to respond to the needs of your members / new emerging sector policy priorities	1	0	3	7	5
Other	0	0	0	1	0

Source: Project survey, 2023, n=16.

Next the Secretariats were asked **their views on the capacity building needs in relation to their participation in the social dialogue process** (see Table 4). Here, again the views of the Secretariats show a consensus, with the majority seeing the following needs as most important – including to ensure active participation of their members in the European level sectoral social dialogue activities, to maintain structures for social dialogue on the most important sectoral policy priorities and to ensure sufficient human resources in the organisation to engage in social dialogue activities at EU level.

Table 4: What are your needs in relation to your organisation’s capacities to participate in the social dialogue process? 1 is least important and 5 is most important

	1 least important	2 less important	3 neutral	4 important	5 very important
To ensure active participation of your members in the European level social dialogue activities in your sector – joint inputs of the EU sectoral social partners into the policymaking at the EU level, negotiations, projects, events, activities	0	0	0	5	11
To maintain structures for social dialogue with your social partner on the most important policy priorities for your sector	0	0	1	4	11
To ensure sufficient human resources in your organisation to engage in social dialogue activities at EU level	0	0	1	7	7
Other needs not mentioned above:	0	0	0	1	1

Source: Project survey, 2023, n=16.

The capacity building needs for the national sectoral members in their countries

In this section, the views of the Secretariats on the capacity building needs of their national members are discussed. Firstly, in relation to their organisation-oriented capacities, there is a consensus between the Secretariats on the top priorities. The majority identified that the two key needs relate to provide / diversify / expand support, training, counselling, information and communication to the members, as well as hiring new staff and training the existing staff. The other priorities were rated as comparatively less important, including to strengthen the membership base of their employer organisations and to adapt their internal organisational structures and work practices to respond to the needs of their members / new sector policy priorities.

Table 5: What do you see as the most important capacity building needs in relation to their organisation-oriented capacities such as the membership, internal structures?

	1 least important	2 less important	3 neutral	4 important	5 very important
To continue to provide / diversify / expand support, training, counselling, information and communication to their members	0	1	1	5	6
To hire new staff and develop further the skills of their staff members – such as analytical skills, negotiation skills, other skills	0	0	2	7	4
To strengthen the membership base of their employer organisations	0	1	4	3	6
To continue to provide / diversify / expand services for their members	0	1	3	4	5
To adapt their internal organisational structures and work practices to respond to the needs of their members / new sector policy priorities	0	1	4	5	3
Other	0	0	0	1	0

Source: Project survey, 2023, n=16.

In relation to the capacity building needs in relation to the national members’ capacities to participate in the social dialogue process, (see Table 6), **the majority of the Secretariats agreed on the key priorities being to develop the social dialogue structures and to ensure sufficient human and financial capacity** of the members to participate in the social dialogue in their countries and at the EU level. Secretariats also agreed on the externally facing priorities being to get their voice heard in the policymaking process in their countries and to advocate for more conducive legislative and political framework supporting more space for collective bargaining in their sector. This echoes the key policy pointers on sectoral capacity building of social partners identified in the recent Eurofound study on the European collective bargaining processes³⁰, which concluded that:

“ The weakness or absence of collective bargaining in some Member States makes a strong case for building the capacity of the social partners in those Member States and for the establishment of frameworks and incentives to support sectoral collective bargaining”.

Table 6: What do you see as the most important capacity building needs in relation to your national members’ capacities to participate in the social dialogue process?

³⁰ Eurofound (2022), Moving with the times: Emerging practices and provisions in collective bargaining, Publications Office of the European Union, Luxembourg.

	1 least important	2 less important	3 neutral	4 important	5 very important
To maintain or set up structures for social dialogue with their social partners in their countries	0	0	2	6	7
To ensure sufficient human and financial resources in their organisations to engage in collective bargaining, social dialogue in their countries	0	0	2	7	5
To get their voice heard in the policymaking process in their countries	0	1	2	1	10
To have sufficient human and financial capacity to participate in the European level activities for your sector - – such as advocacy, inputs into the policymaking at the EU level, projects, events, activities	0	1	2	6	5
To advocate for more conducive legislative and political framework supporting more space for collective bargaining in their sector	0	1	3	5	5
Other	0	0	1	0	0

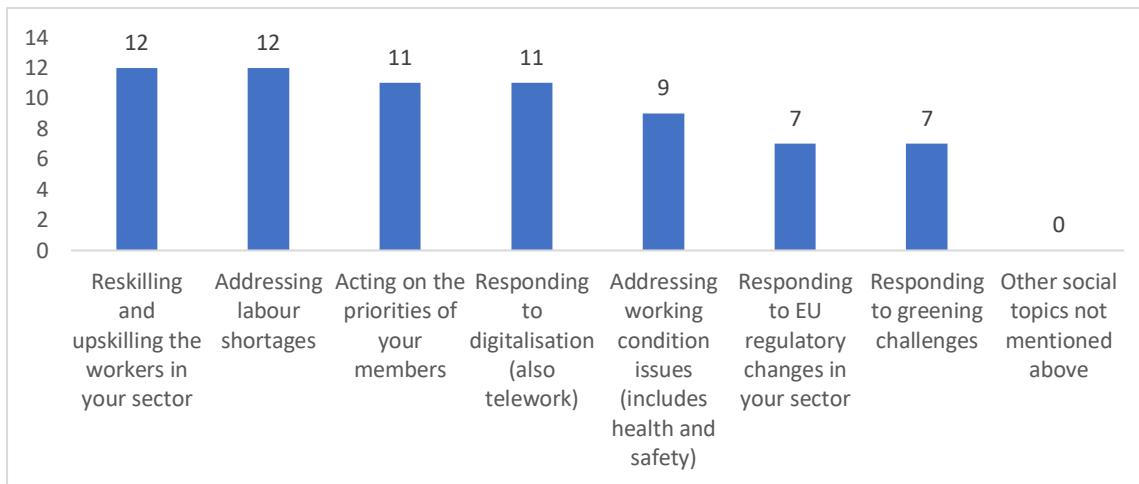
Source: Project survey, 2023, n=16.

Next, the Secretariats expressed their views on the **main policy priorities in their sector where the capacity building needs remain** (see Figure 6). On this issue, there was a consensus between the respondents, with two key top priorities for building capacity being the reskilling and upskilling of the workers and addressing labour shortages in the respective sectors. As expressed by one respondent, *“The above issues are the main trends of the ongoing sector's transformation.”*

This is followed by addressing the priorities of their members and responding to the digitalisation related changes in the respective sectors. Fewer Secretariats indicated among the top priorities: addressing the working conditions, responding to the EU regulatory changes and addressing the green transition challenges. At the same time, a number of Secretariats pointed out that these priorities are closely interconnected and interlinked and form an integral part of their work on social policy issues. For example, in the banking sector, in the view of EBF, the digital and sustainable developments are changing the banking sector, and staff need to be trained to stay abreast of these developments. Similar views are expressed by Eurocommerce, which sees that:

“The suggested priorities are interconnected and form an integral part of the daily routine for the Jobs & Skills Committee. This is particularly crucial because the sector is currently undergoing a triple transformation, making these priorities of utmost significance to our members.”

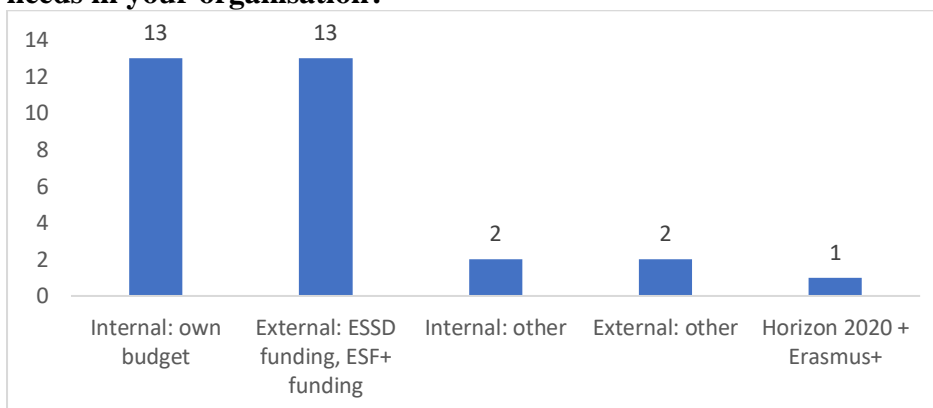
Figure 6: On which social affairs policy priorities do you see the main capacity building needs in your sector?



Source: Project survey, 2023, n=16. Multiple choices possible.

As shown in Figure 7, the majority of Secretariats use a range of avenues of support to address the capacity building needs in the organisations. For the majority, the two most important sources are internal own budget in the organisations and external ESSDC and/or ESF+ funding. Only two Secretariats use other sources, including other internal and external sources. Of interest is the experience of using Horizon2020 and Erasmus+ funding reported by the Secretariat in the HORECA sector.

Figure 7: What avenues of support do you currently use to address the capacity building needs in your organisation?



Source: Project survey, 2023, n=16. Multiple choices possible.

The views on whether the current avenues of support are sufficient for the capacity building in the organisations diverge between the Secretariats (see Table 7). Also noteworthy is a comparatively smaller number of Secretariats responding to this question, with one respondent indicating that they do not think it is appropriate to comment on the adequacy of funding, especially the internal funding. Points raised by three Secretariats referred to their experiences of not having the necessary human resources to undertake all the activities and projects in the context of building capacity and participating in the social dialogue. One Secretariat also raised the point that they work on a wider range of issues apart from social policy issues. In contrast, their trade union counterparts concentrate on social policy issues, and hence comparatively the resources allocated are smaller.

Table 7: To what extent are the current avenues of support sufficient for your capacity building?

	1 not sufficient at all	2 insufficient	3 neutral	4 sufficient	5 very sufficient
External: ESSDC funding, ESF+ funding	0	5	1	5	1
Internal: own budget	0	3	6	4	1
Internal: other	1	3	3	0	0
External: other	1	1	2	0	0

Source: Project survey, 2023, n=14.

The Secretariats were asked specifically about their experiences with using the ESF+ funding for the capacity building needs of their organisations and their national members. Secretariats identified a number of challenges with using the ESF+ funding. The first issue is that the funds are **not sufficiently known at national level**. For example, the Secretariat in the audio-visual sector reported members feedback that it is difficult to get access to information from member state authorities about possible avenues of funding and to get funding. There seems to be a significant gap between the EU level announcements on the option for funding for social partners and the actual member state level. Another experience reported in the chemicals sector relates to the situations where funding is allocated to the cross-sectoral business representations for the further disbursement on the ground. From this perspective, there seems to be a lack of transparency from the national cross-sectoral business representatives in terms of allocated funds vis-a vis sectoral employers' representatives for the members in need. In this regard, the question of information and knowledge of ESF+ funds could be further explored in the next round of the project where national sectoral organisations could be asked to further elaborate their knowledge and awareness of ESF+ channels for the capacity building of national sectoral social partners.

Thus, more awareness raising is needed of the ESF+, including the knowledge of how to apply more efficiently to these funds amongst the trade unions and employer representatives.

The second issue identified relates to the **difficulties to apply to and run such projects due to the necessary human resources and the ESF+ administrative burden**. As an example, in the temporary work agency sector, WEC-Europe and UNI-Europa are currently engaging in the first capacity building project in the ESF+ context (this is being checked with the WEC Europe). An aspect of concern has been that due to the new e-grant system, the processing and approval of submitted projects takes too long, leading to delays in starting project activities. Thus, funding is not easily accessible and that the access to the different budget lines/programmes should be simplified. Moreover, one Secretariat reported experiences of their members when the ESF+ funding does not reflect the actual costs incurred in the Member States. Travel allowances and the daily subsistence rate should be increased and reviewed on a more regular basis to take into account global developments.

One proposed solution put forward by Eurocommerce to make the ESF+ funding more attractive and improve its take-up is better communication, the offering of access, and fast lane procedures to be effective and the empowerment of local and regional representative associations that could act as a bridge between these funds and the companies that are seeking the ESF+ finance. Alternative means of administering these funds could be explored, for example, through national initiatives that exist in Ireland, Lithuania, Latvia and Poland that offer voucher schemes as public private partnerships to facilitate access. The benefits and

possible encouragement of further use of such methods could be explored, provided that this does not artificially increase the price charged by service providers.

As a result of these challenges, the **interest and the use of ESF+ funding for sectoral employers' organisations remains limited**. In the live performance sector, some national members benefit from ESF + usually through a cooperation with another organisation to which they are linked (e.g. a social fund). In this context, some national members use the ESF+ funding for research, studies, set up of certain funds or training support in a particular area. For example, in the HORECA sector, HOTREC reported that out of the 47 National Associations, a few members are interested in the ESF+ funding (for instance, members in Malta, Slovenia, Croatia, Lithuania, Spain, Ireland and Italy). In the next round of the project, it could be useful to hear from the other sectoral EU secretariats in which countries their members see the need for capacity building support.

These findings echo similar findings on the limited use of ESF for the capacity building of social partners in the previous 2014-2020 period, where a study on this aspect found that³¹:
“ESF resources allocated in the 2014-2020 period appear insufficient to meet social partners’ capacity building requirements and are not made available in a suitable way (i.e. in a way which reflects different countries’ needs) at the EU and Member State level.”

Conclusions

The survey collected the most recent information from 17 Secretariats of European sectoral employer organisations about the latest sectoral social dialogue processes and the capacity building needs for their organisations and their national members. This EU level survey links with the national survey issued in the project which was answered by the national members of the European sectoral employer organisations. Taken together, both surveys provide valuable information on the current landscape of the social dialogue, collective bargaining and capacity building needs at the European and national sectoral levels. A key common theme across both surveys is the continuing needs for further capacity building for both European and national sectoral employer organisations. The survey findings are used by BusinessEurope, SMEunited, SGI Europe and the sectoral European employer organisations for a further follow up and information to support their work as employers organisations at the European level. A second round of both surveys will be launched in 2024, with results available in late 2024.

³¹ Weber, T. and Pavlovaite, I. (2018), EU Social Partners' project on 'The European Social Fund: Supporting Social Dialogue at National, Regional and Local Levels': Final report, Brussels.